

EXHIBIT 1

Coastal Conservancy Statewide Survey

- Report on Results -

April 24, 2017



Opinion Research
on Public Policy

Probolsky Research 20 2nd Street 3rd Floor #3172 San Francisco CA 94106	San Francisco Newport Beach Washington DC	(415) 870-8150 (949) 856-0400 (202) 559-0270
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Coastal Conservancy – Statewide Survey

Report on results

From Thursday, March 23 to Wednesday, March 29, 2017, Probolsky Research conducted a telephone survey of California residents.

A total of 1200 residents were surveyed. A survey of this size yields a margin of error of +/- 3.2% with a confidence level of 95%. Interviews were conducted with residents on both landline and mobile phones (30%) and were offered in English and Spanish languages.

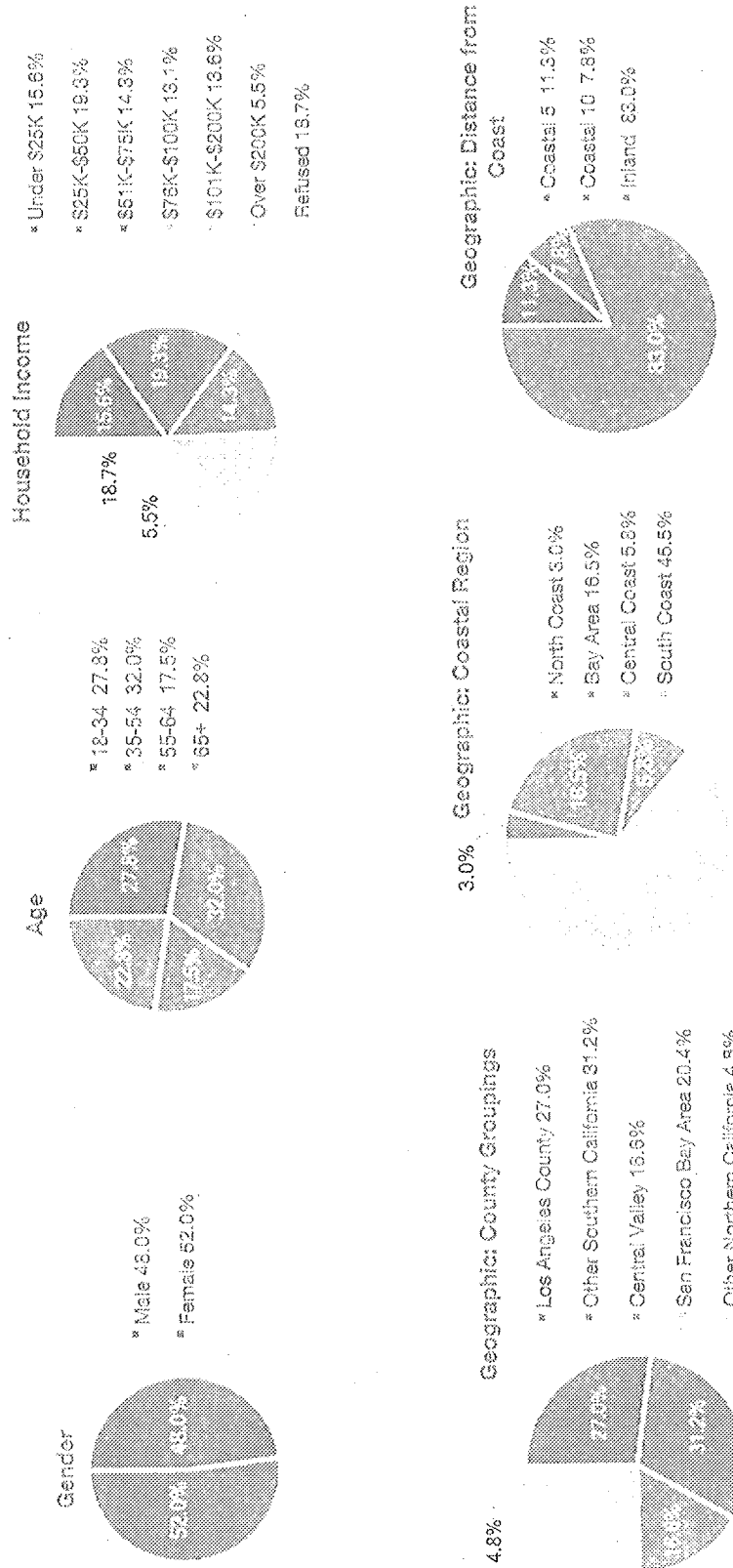
Probolsky Research specializes in in opinion research on behalf of business, government, non-profit and special interest clients.



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Sizes of Demographic/Geographic Categories Snapshot

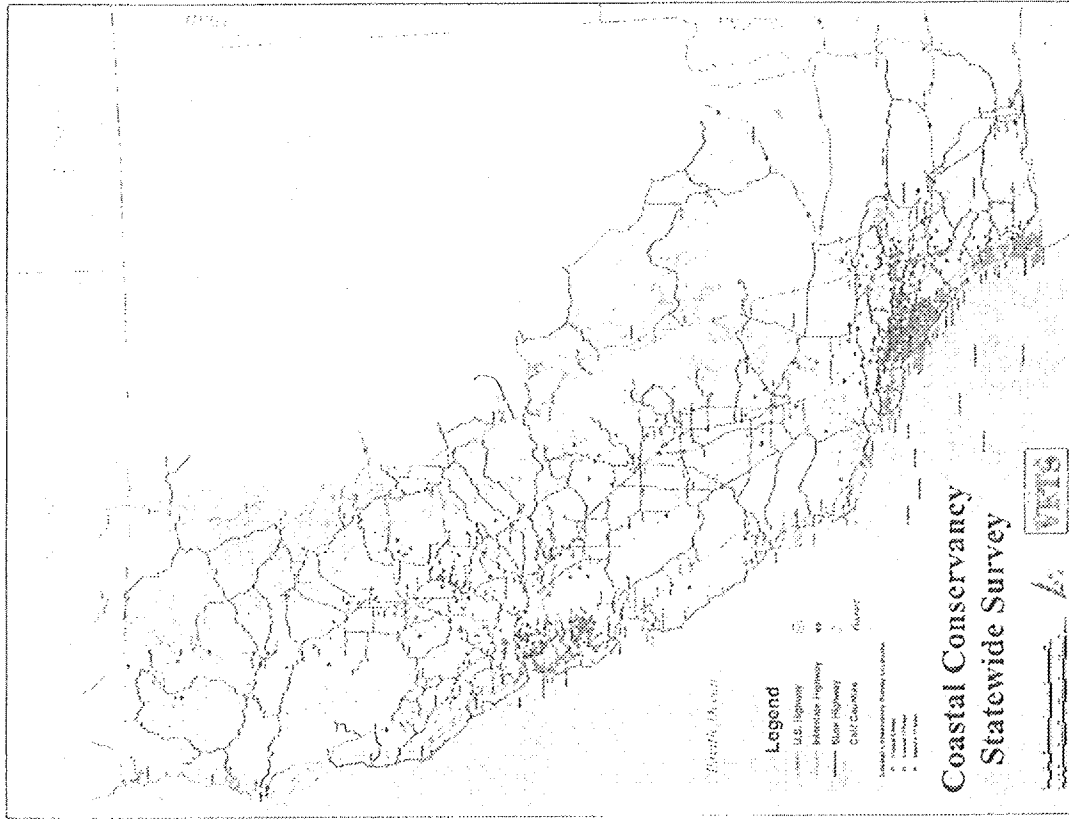


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Top Issues

Open-ended question



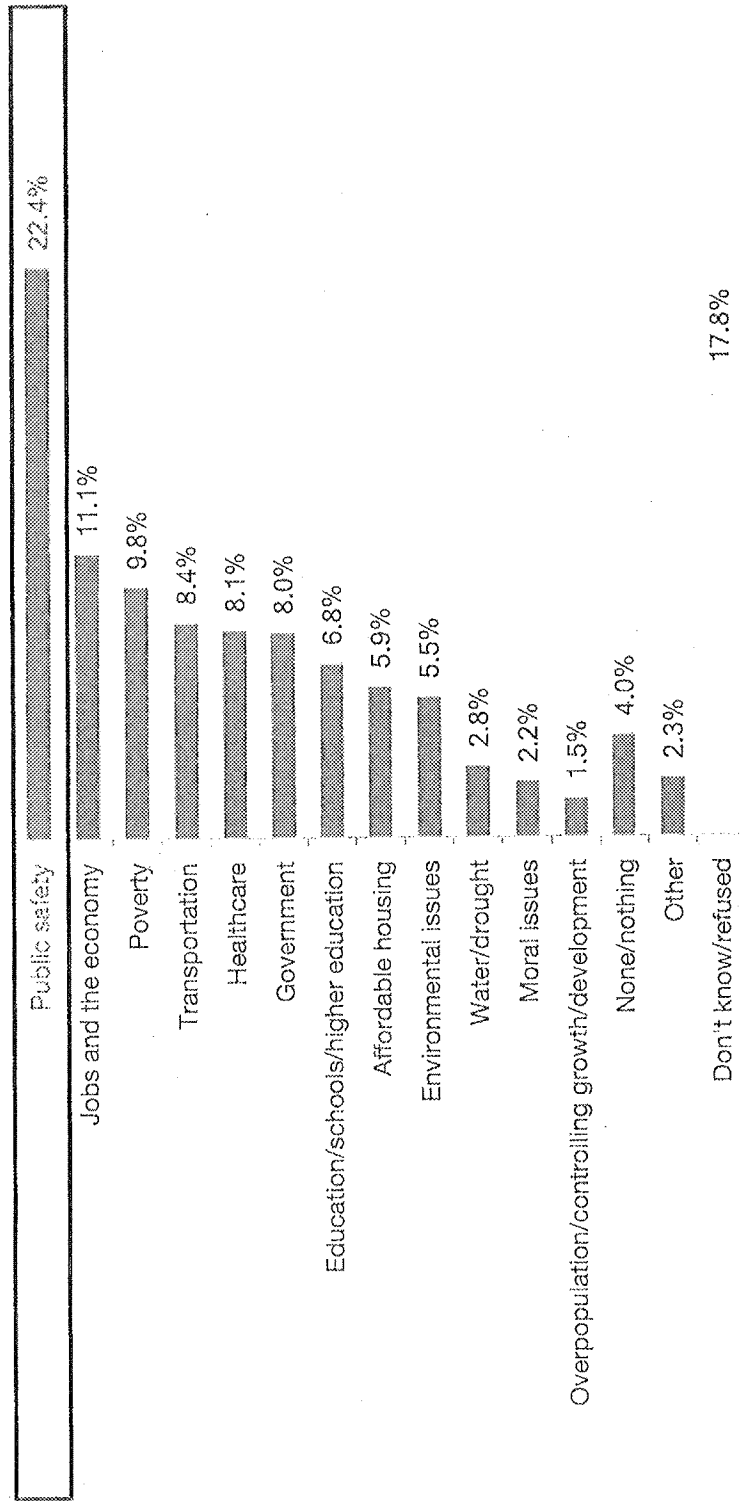
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Public Safety is the Most Important Issue

Among California residents

Question: What is the most important issue facing your community today?



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Overall Coastal Experience

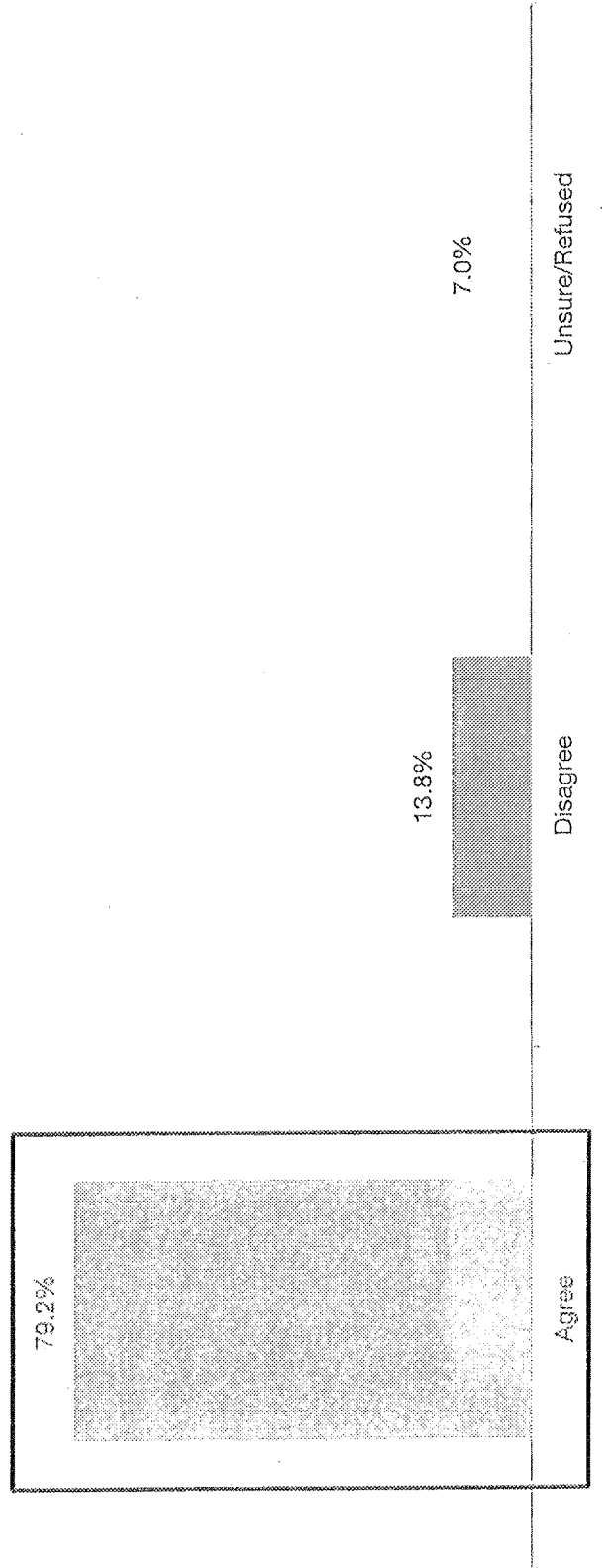


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79.2% of Respondents Say that California Beaches are clean and safe places to visit

Statement: California beaches are clean and safe places to visit.

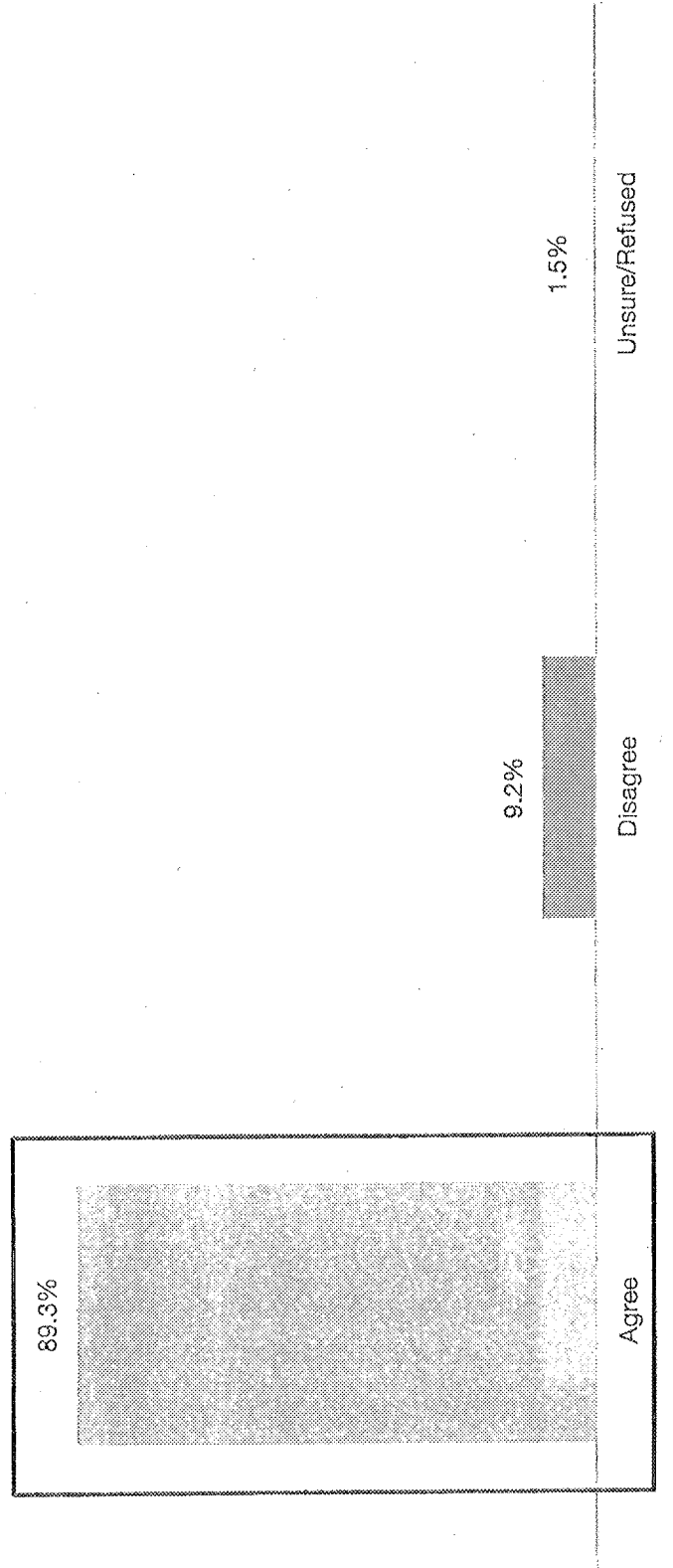


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89.3% of Respondents Agree that the California coast, including beaches and the ocean, are personally important to them

Statement: The California coast, including beaches and the ocean are personally important to me.

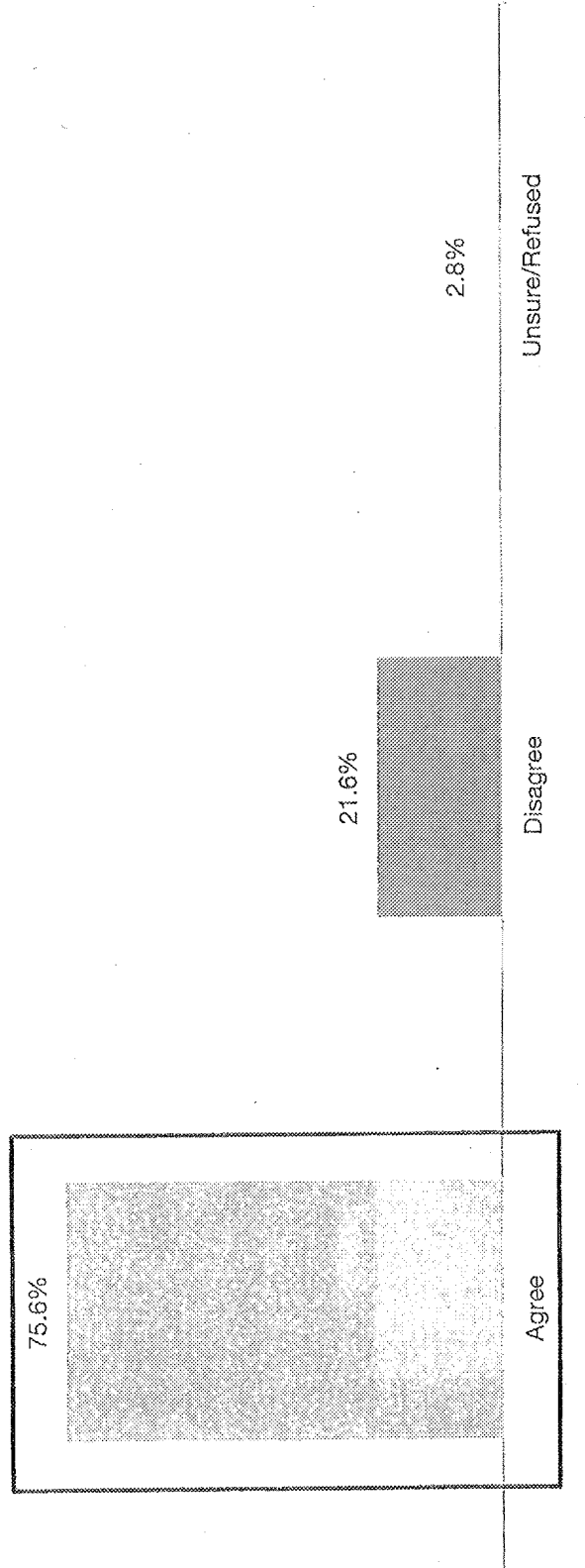


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75.6% Agree that Even When They are Not Visiting the California coast, they feel a strong connection to it

Statement: Even when I am not visiting the California coast, I feel a strong connection to it.



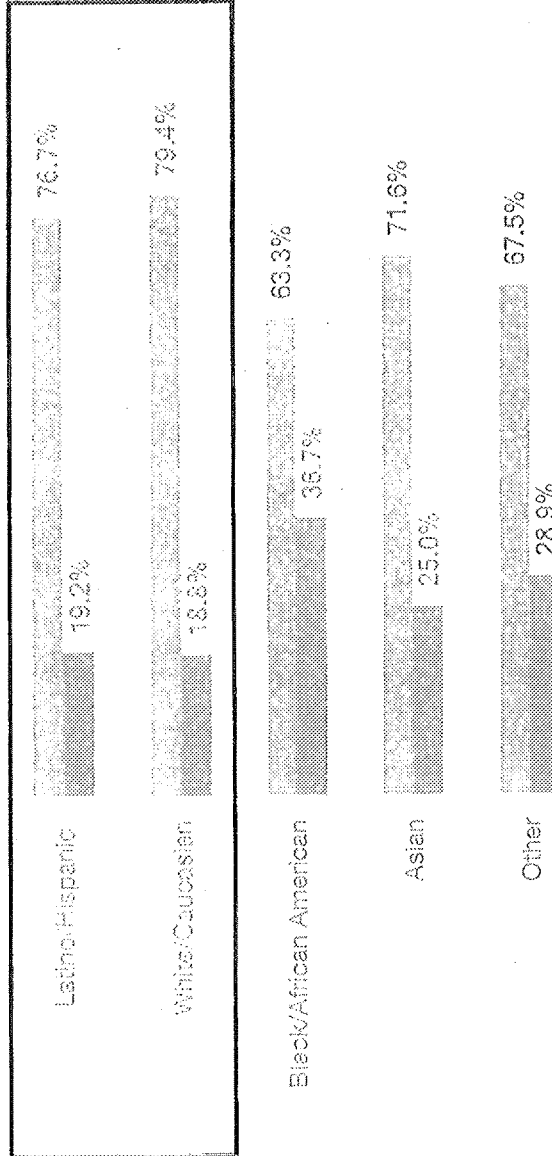
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Latino/Hispanic and White/Caucasian

Respondents feel a strong connection to the CA coast, even when they are not visiting

Statement: Even when I am not visiting the California coast, I feel a strong connection to it.

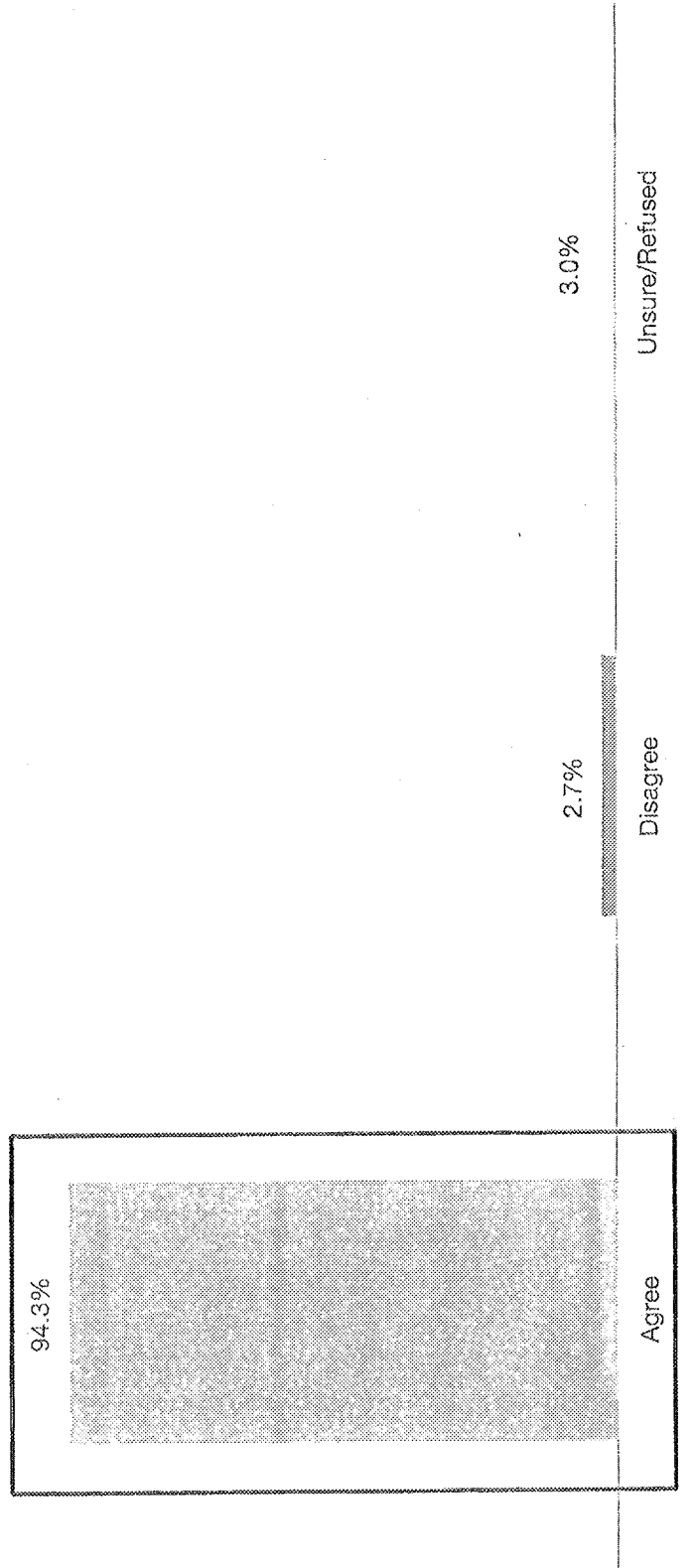


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94.3% Agree that People of All Backgrounds Are welcome at the California coast

Statement: People of all backgrounds are welcome at the California coast.

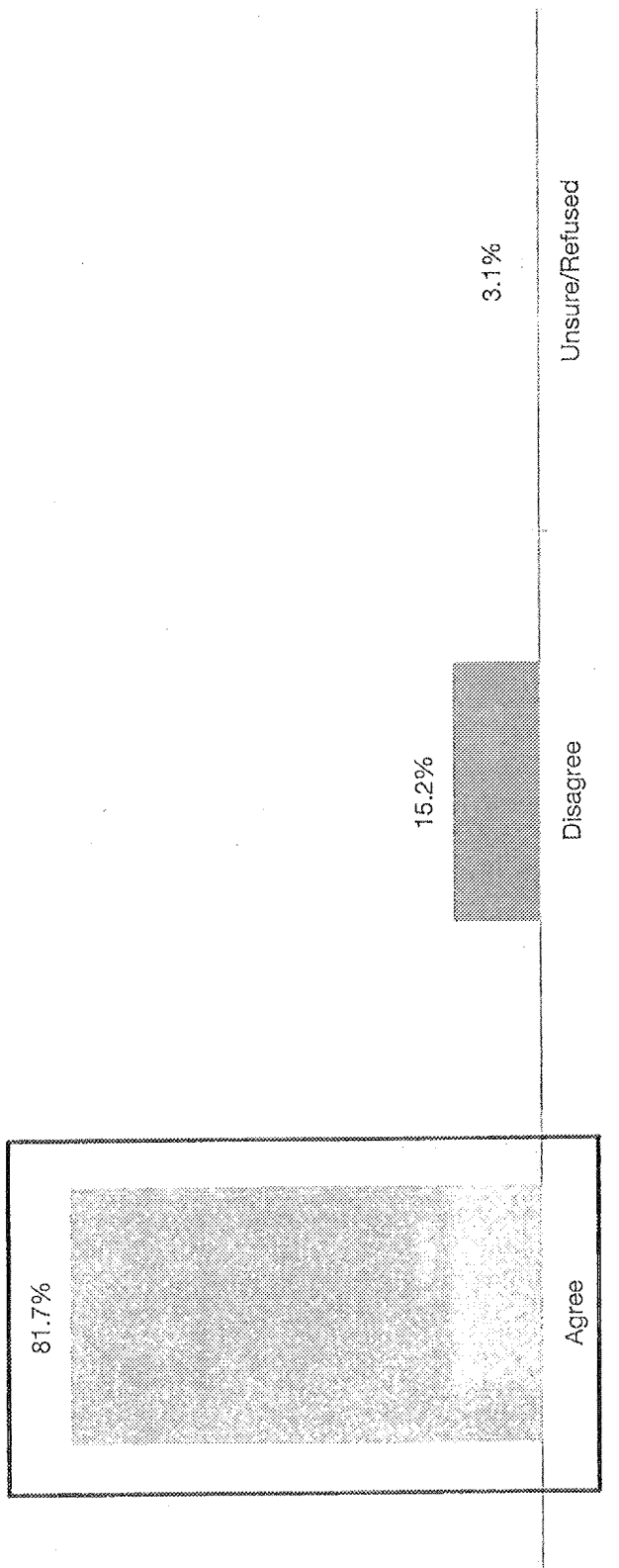


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81.7% of Respondents Say They are Familiar with California's beaches and their amenities

Statement: I am familiar with California's beaches and their amenities.



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Childhood Memories of the CA Coast



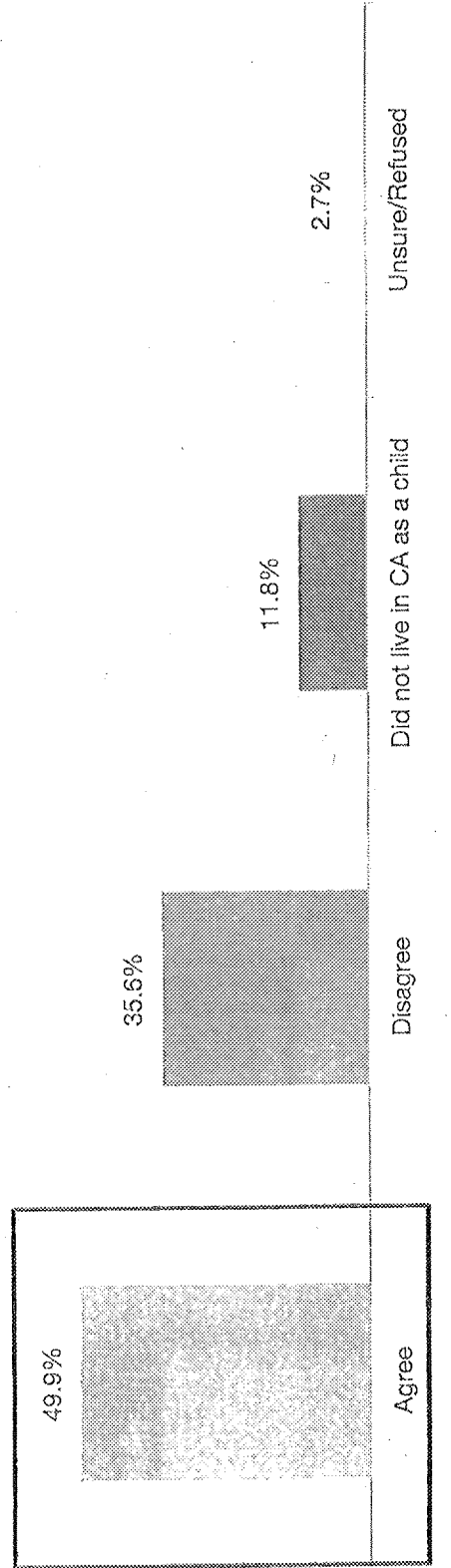
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49.9% of Respondents Say They Have

Fond memories of visiting the CA coast on school field trips when they were kids

Statement: I have fond memories of visiting the California coast on school field trips when I was a kid.

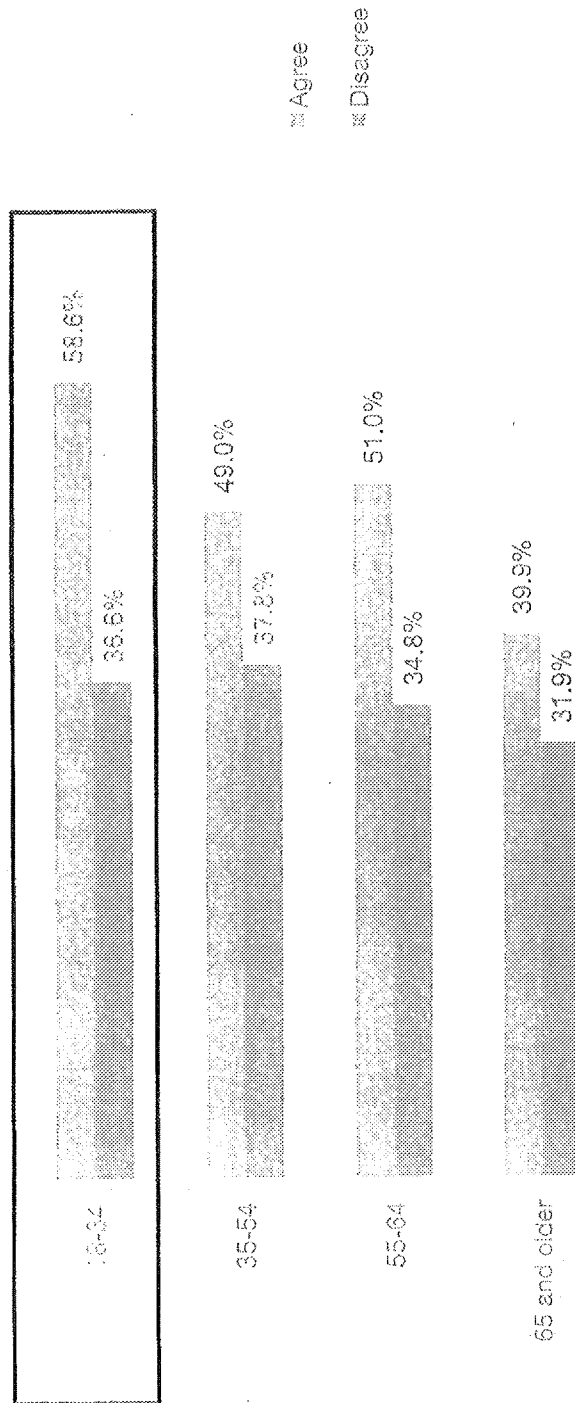


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Younger Respondents Agree the Most that They have fond memories of visiting the CA coast on school field trips when they were kids

Statement: I have fond memories of visiting the California coast on school field trips when I was a kid.



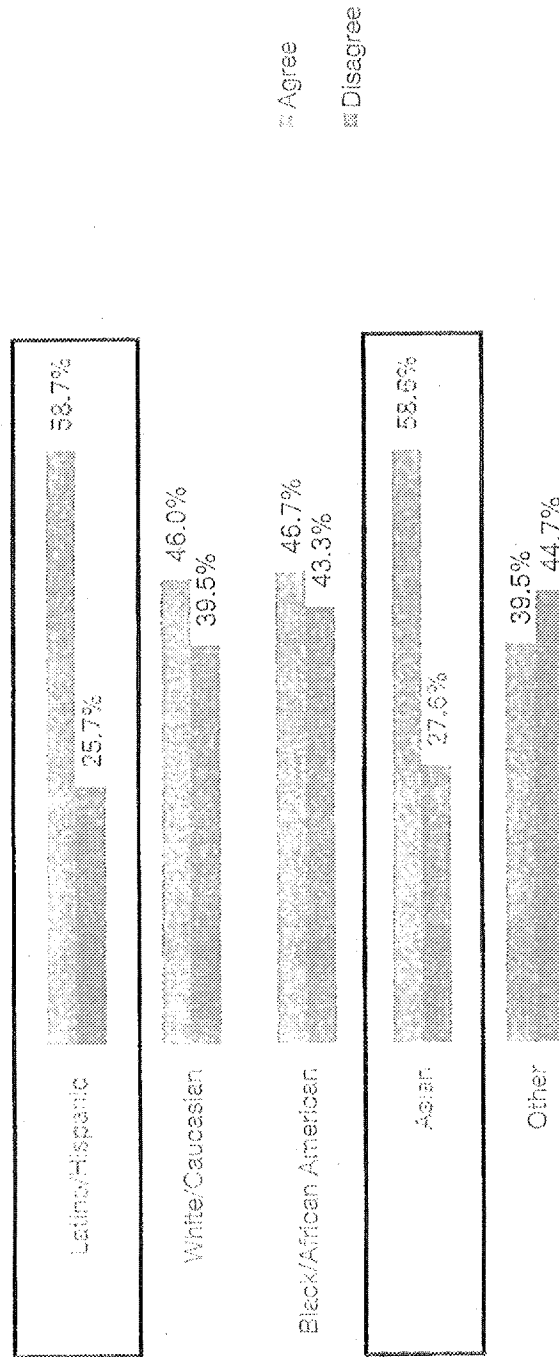
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Latino/Hispanic and Asian Respondents

Agree almost equally that they have fond memories of visiting the CA coast when they were kids

Statement: I have fond memories of visiting the California coast on school field trips when I was a kid.



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How Often do California Residents Visit the Coast?



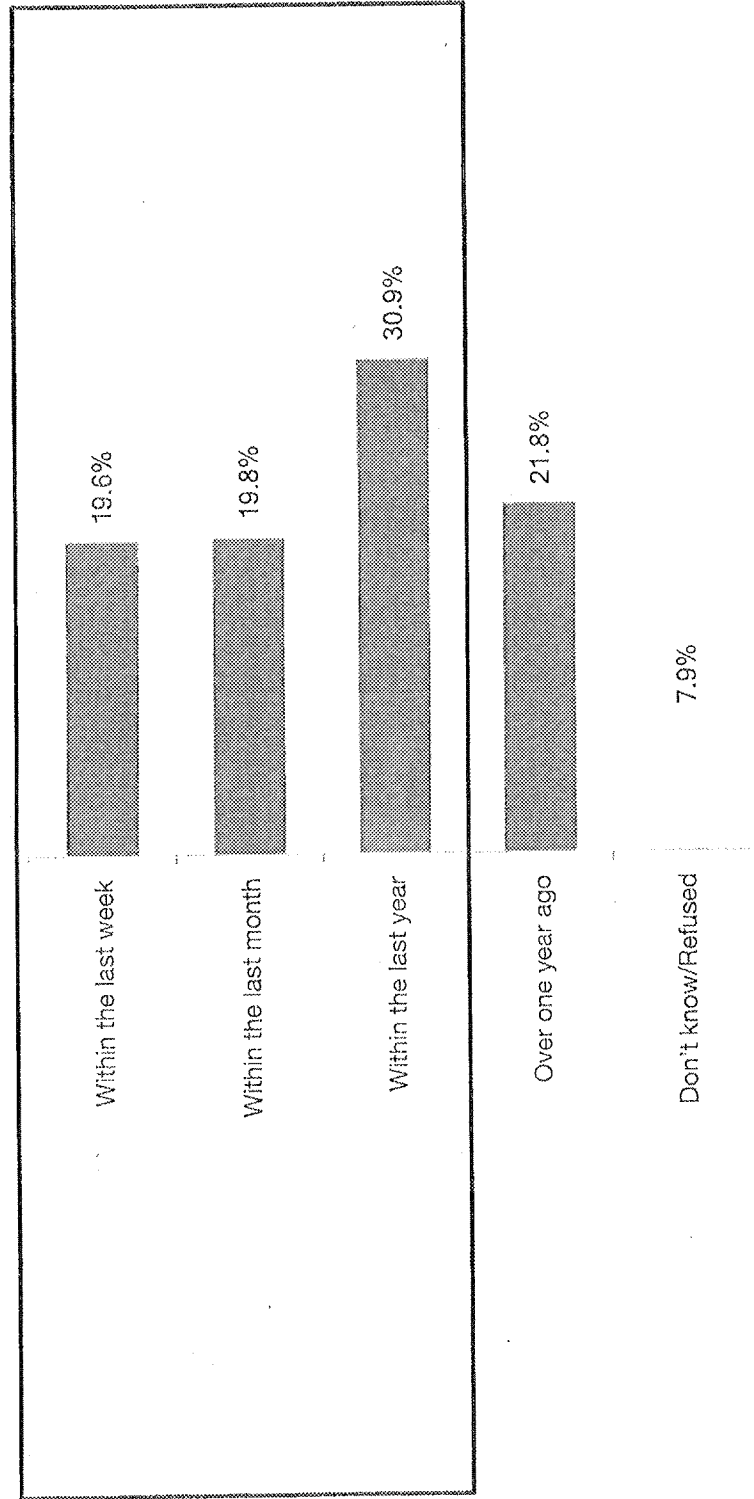
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Over 70% of Respondents Say They Visited The coast within the last year

Question: When was the last time you went to the coast in California?



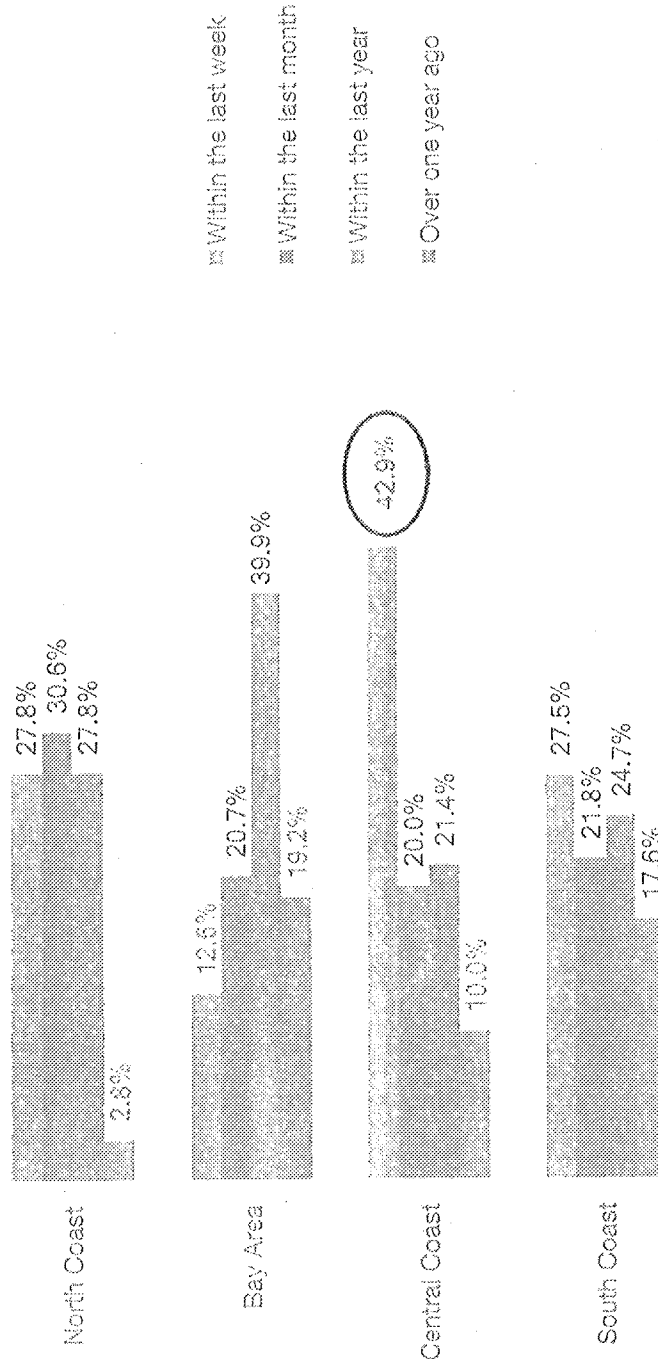
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42.9% of Central Coast Respondents

Report that the last time they've been to the coast was within the last week

Question: When was the last time you went to the coast in California?



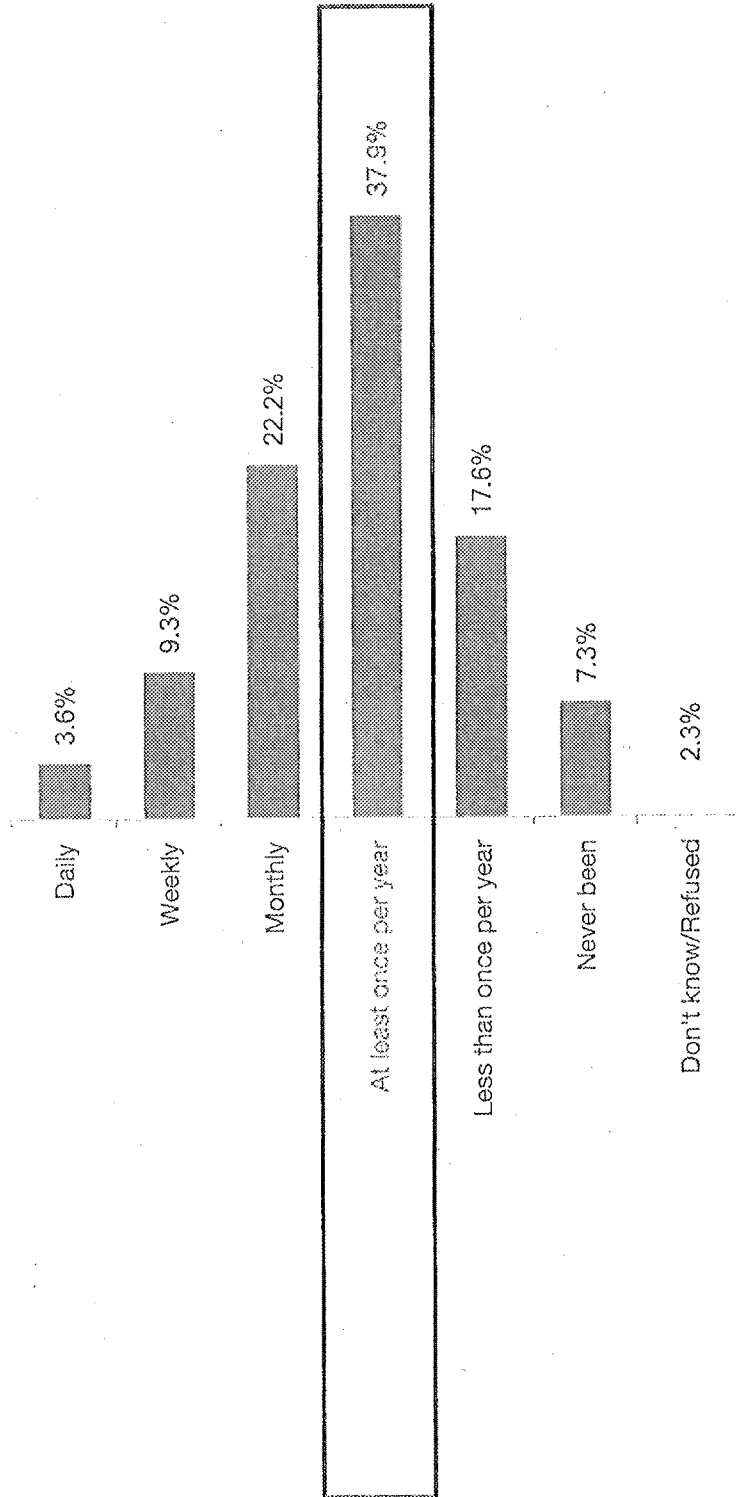
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More Respondents Go to the Coast

"At least once per year" (37.9%) than any other frequency

Question: How often do you go to the coast in California?



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Traveling to the CA Coast

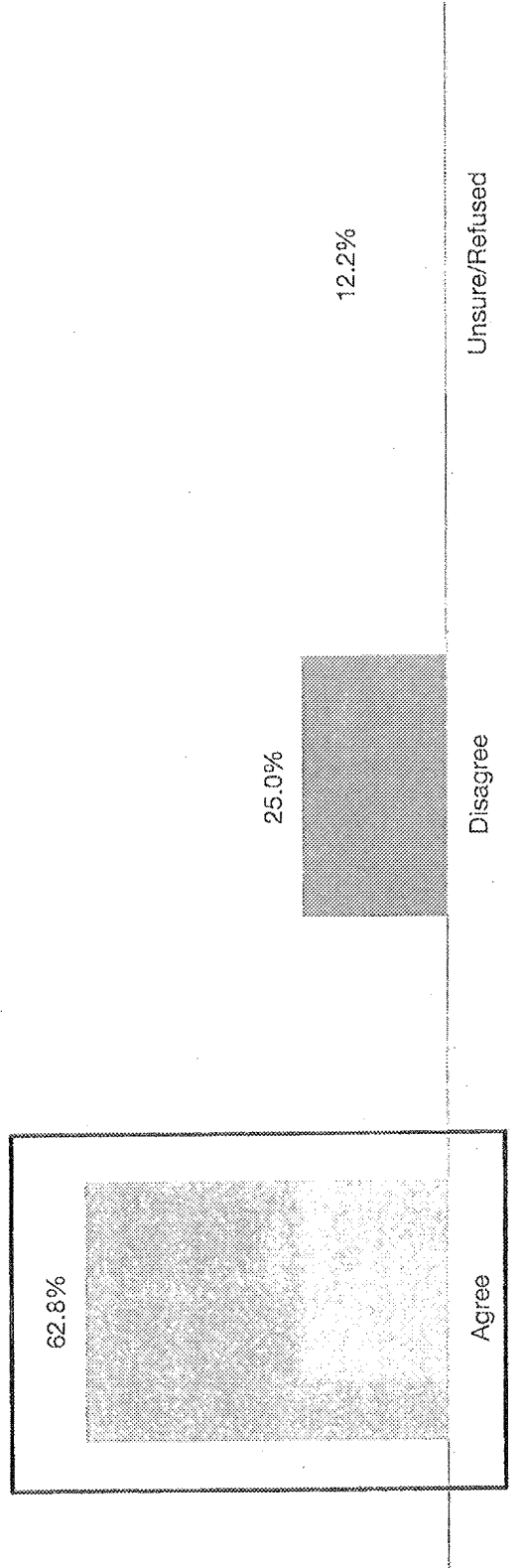


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62.8% of Respondents Agree that Transportation to the CA coast is convenient and affordable

Statement: Transportation to the California coast is convenient and affordable.

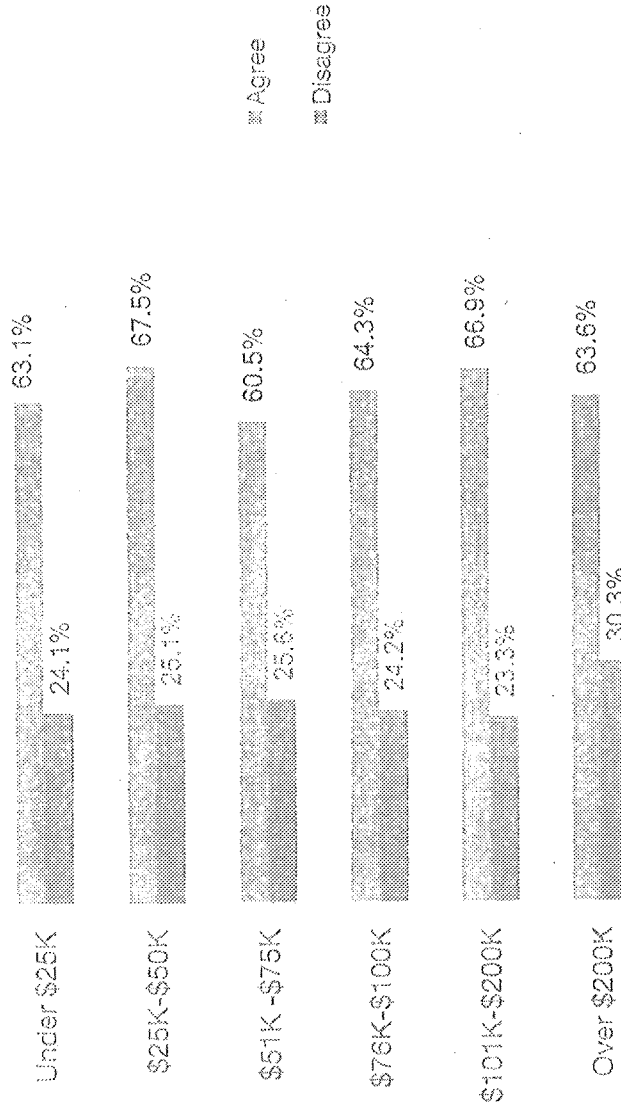


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Respondents of All Income Brackets Agree That transportation to the CA coast is convenient and affordable

Statement: Transportation to the California coast is convenient and affordable.



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Arriving to the CA Coast (Parking)

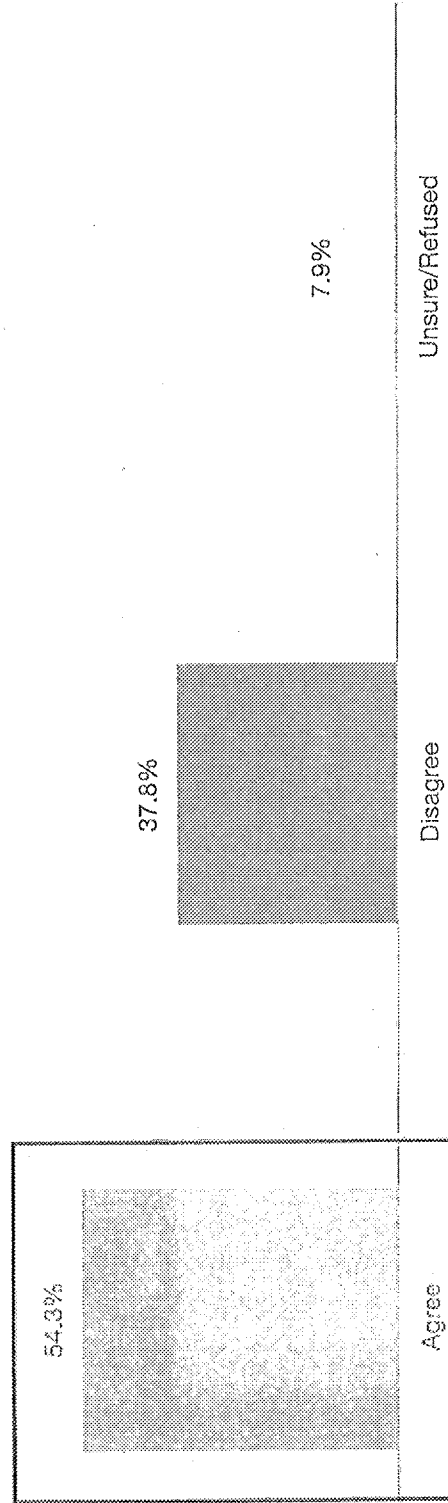


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54.3% of Respondents Agree that Parking Is convenient and generally available at the California coast

Statement: Parking is convenient and generally available at the California coast.

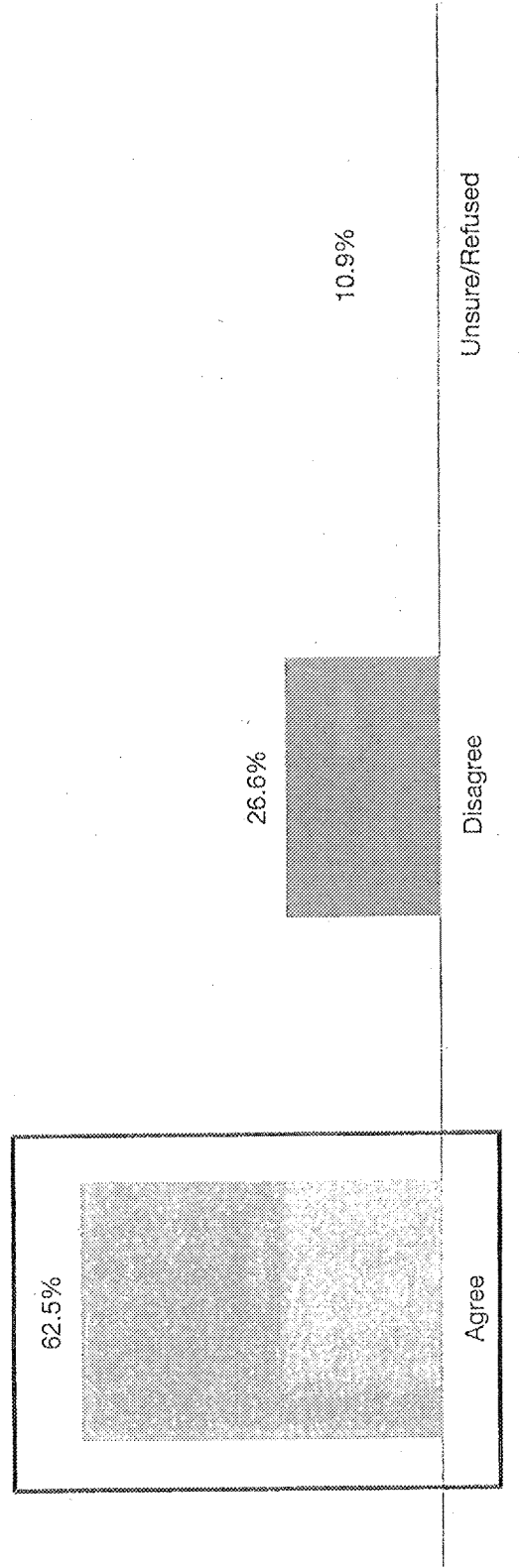


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62.5% of Respondents Agree that Parking Is affordable at the California coast

Statement: Parking is affordable at the California coast.



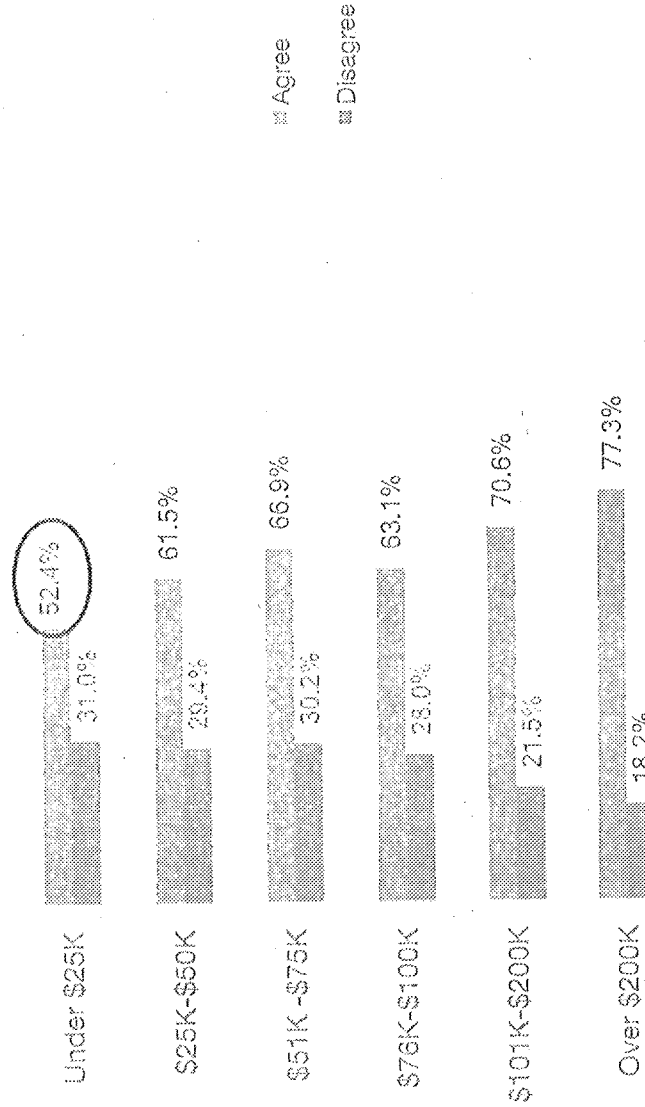
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A Majority Among All Income Brackets

Agree that parking is affordable at the CA coast

Statement: Parking is affordable at the California coast.



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Experience at the Coast



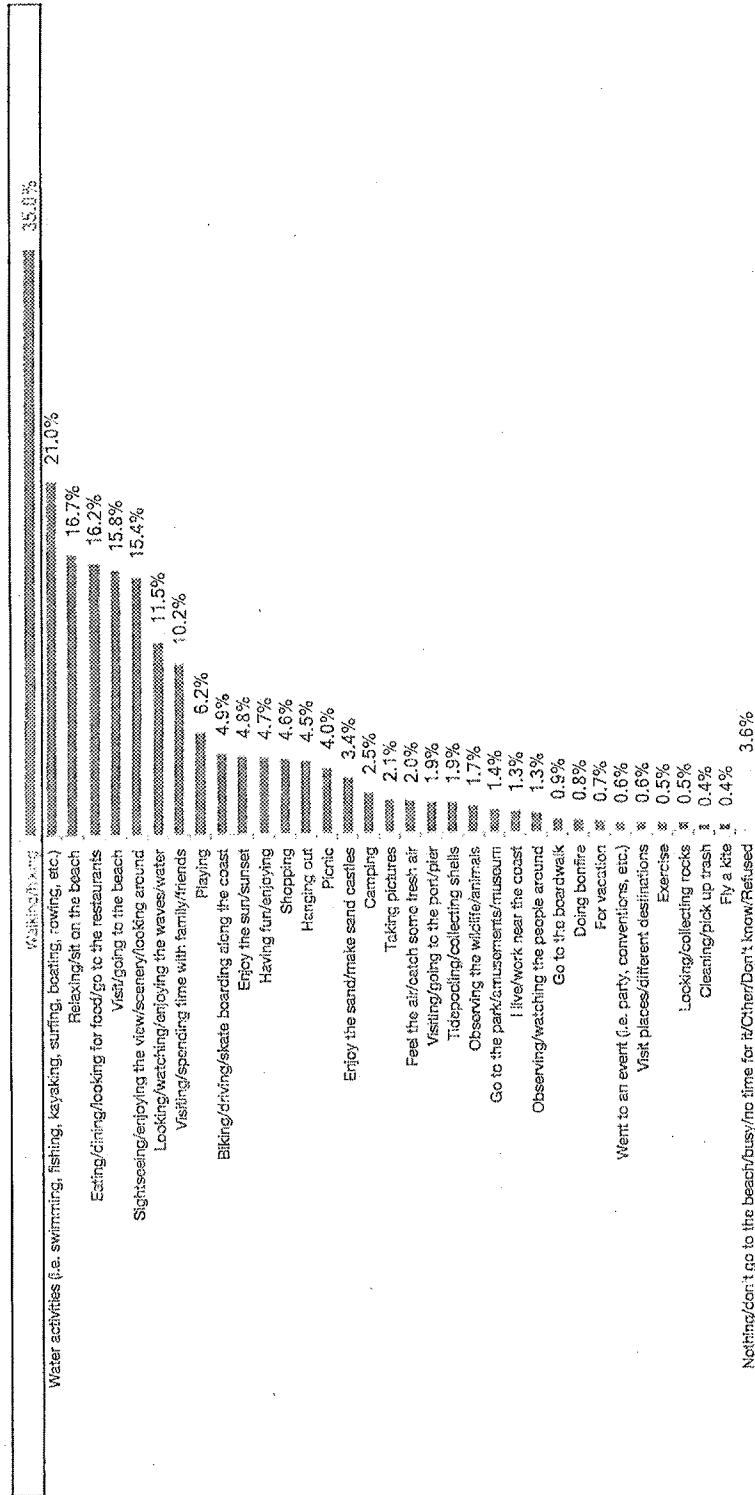
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35% of Respondents Cite Walking/Hiking

As their main activity when they visit the coast

Question: In your own words, please tell me what do you do when you get to the coast in California?



ASKED OF THOSE WHO HAVE VISITED THE COAST

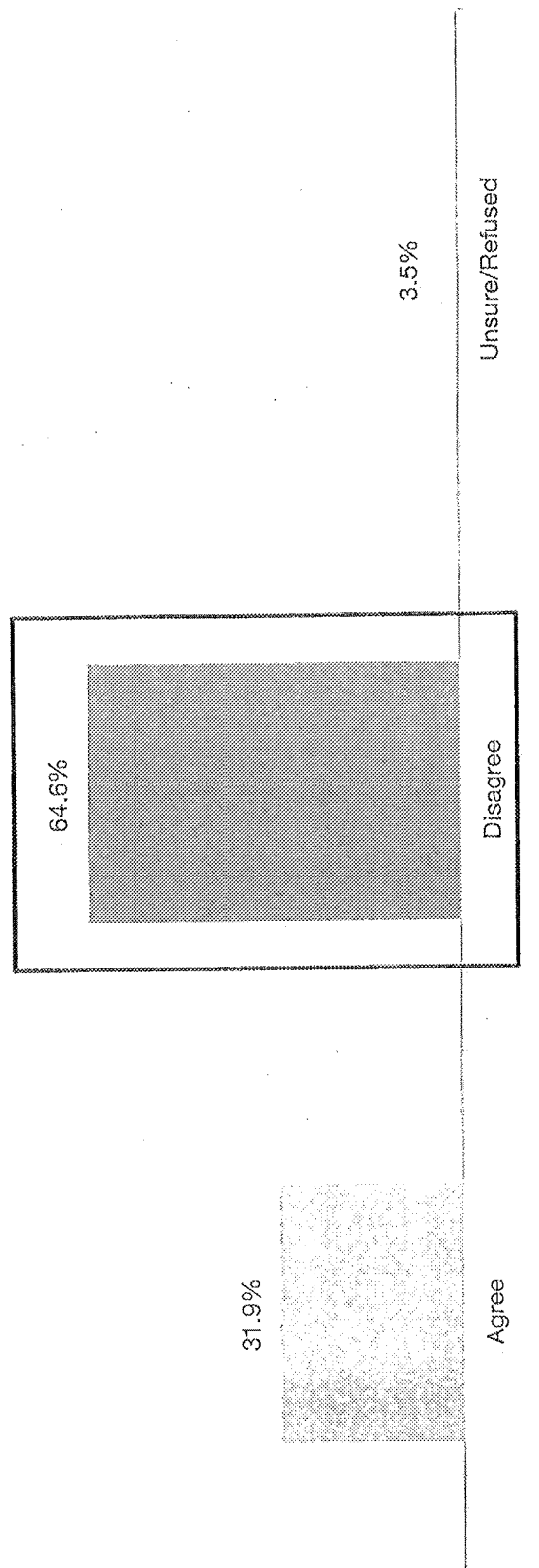


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64.6% Do Not Wish There were More Things to do at the CA coast when they get there

Statement: I wish there were more things to do at the California coast when I get there.



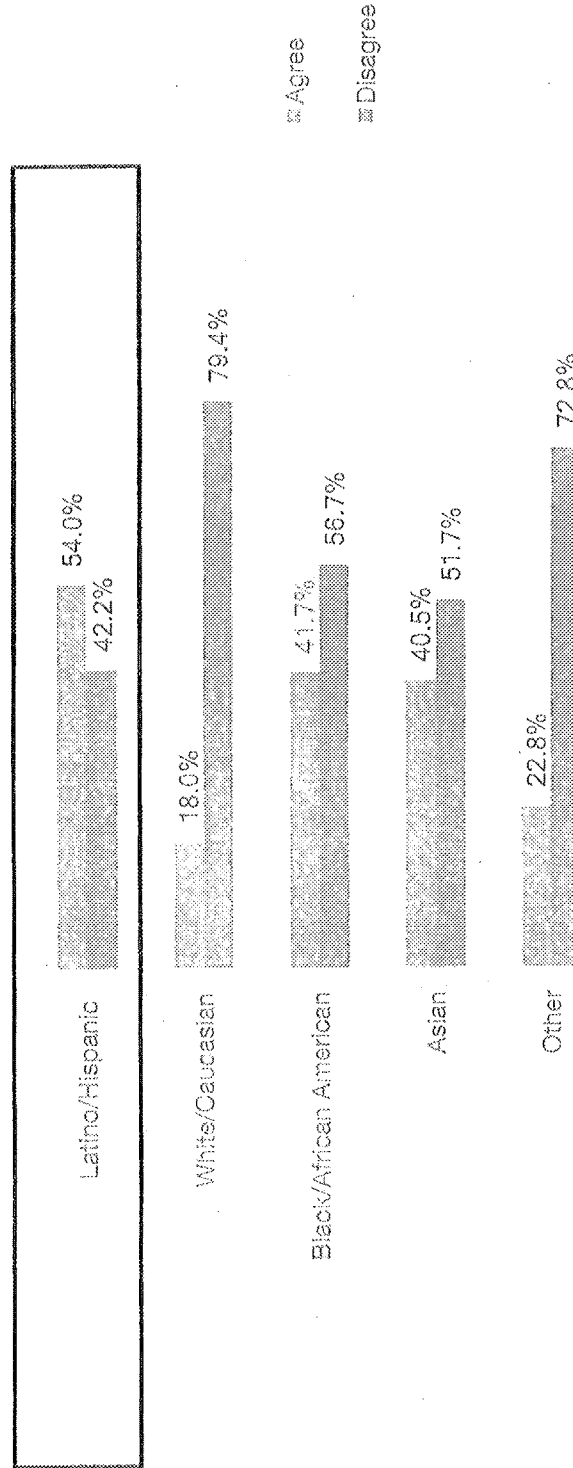
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A Majority of Latino/Hispanic Residents

Wish there were more things to do at the CA coast

Statement: I wish there were more things to do at the California coast when I get there.

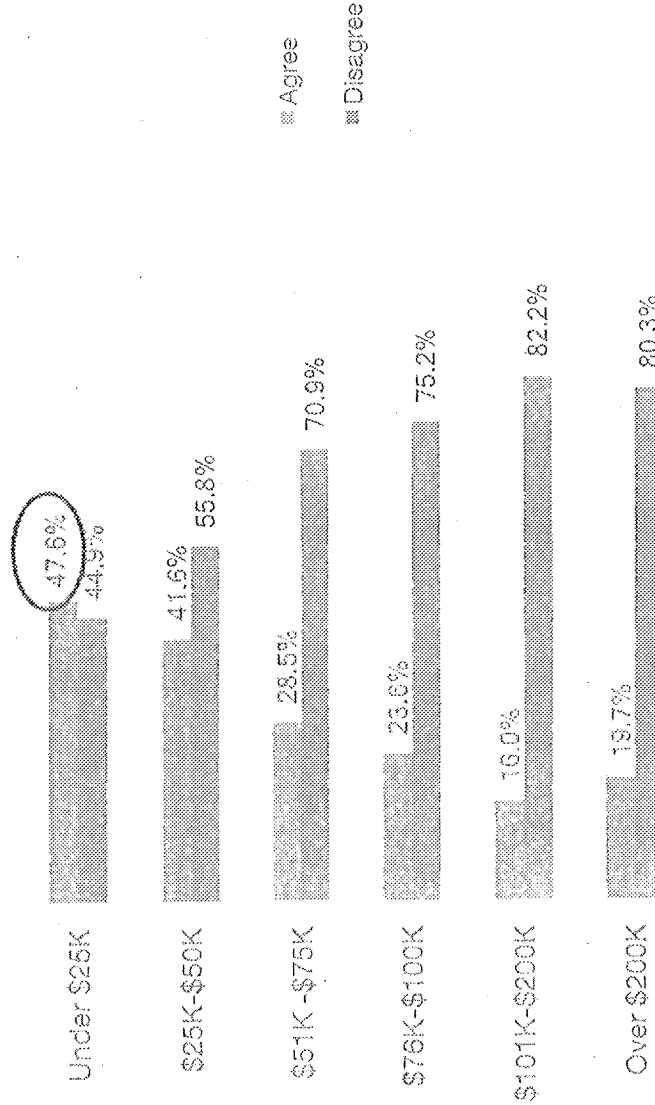


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47.6% of Respondents with an Income Under \$25K wish there were more things to do at the CA coast when they get there

Statement: I wish there were more things to do at the California coast when I get there.



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Staying Overnight at the Coast

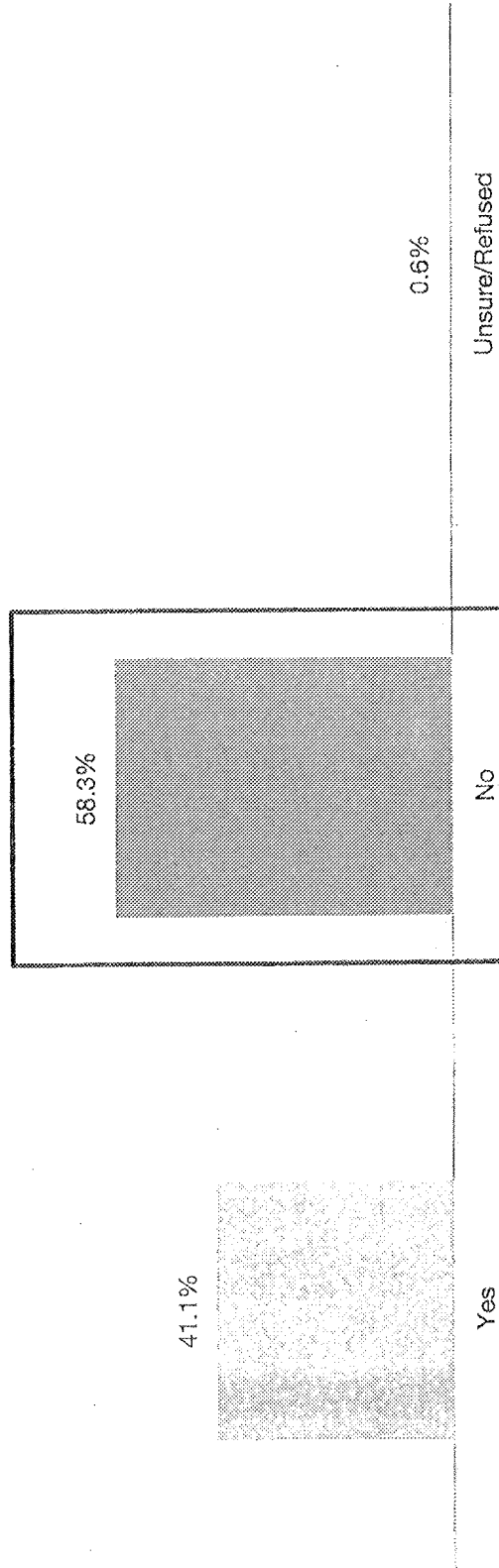


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58.3% Do Not Stay Overnight When They Visit the California coast

Question: Do you ever stay overnight when you visit the California coast?

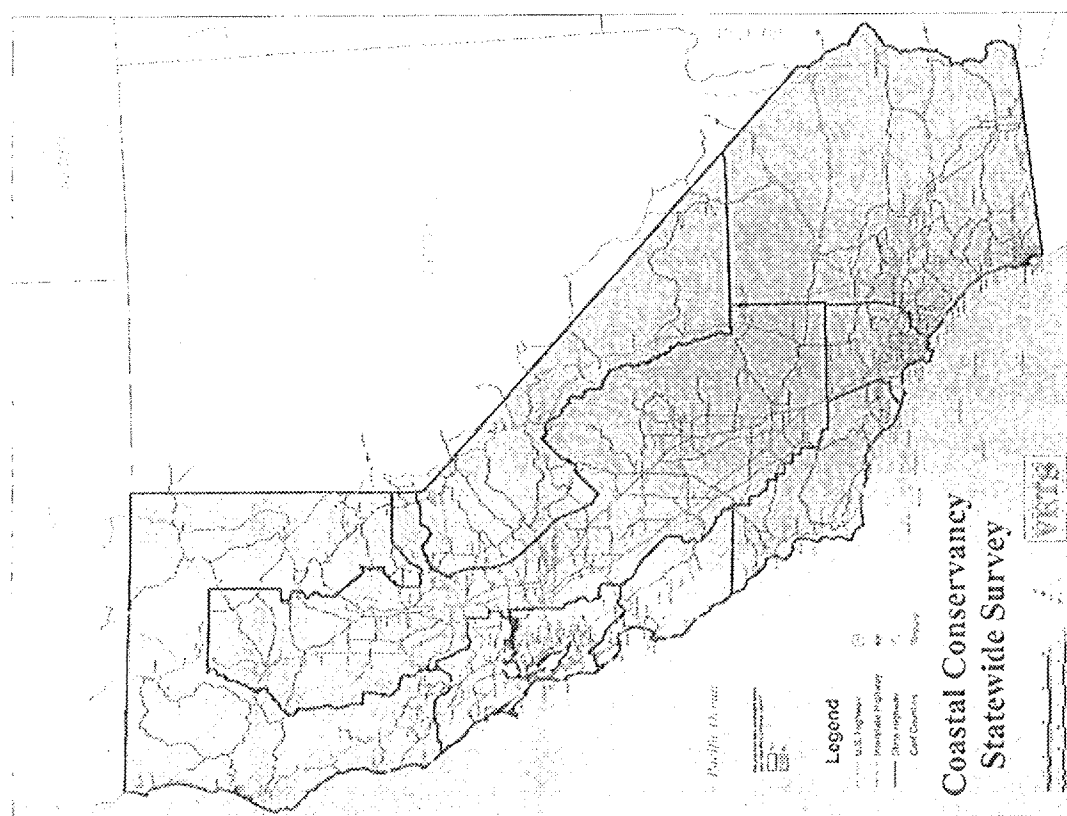


*ASKED OF ALL EXCEPT THOSE WHO RESPONDED "NEVER BEEN"



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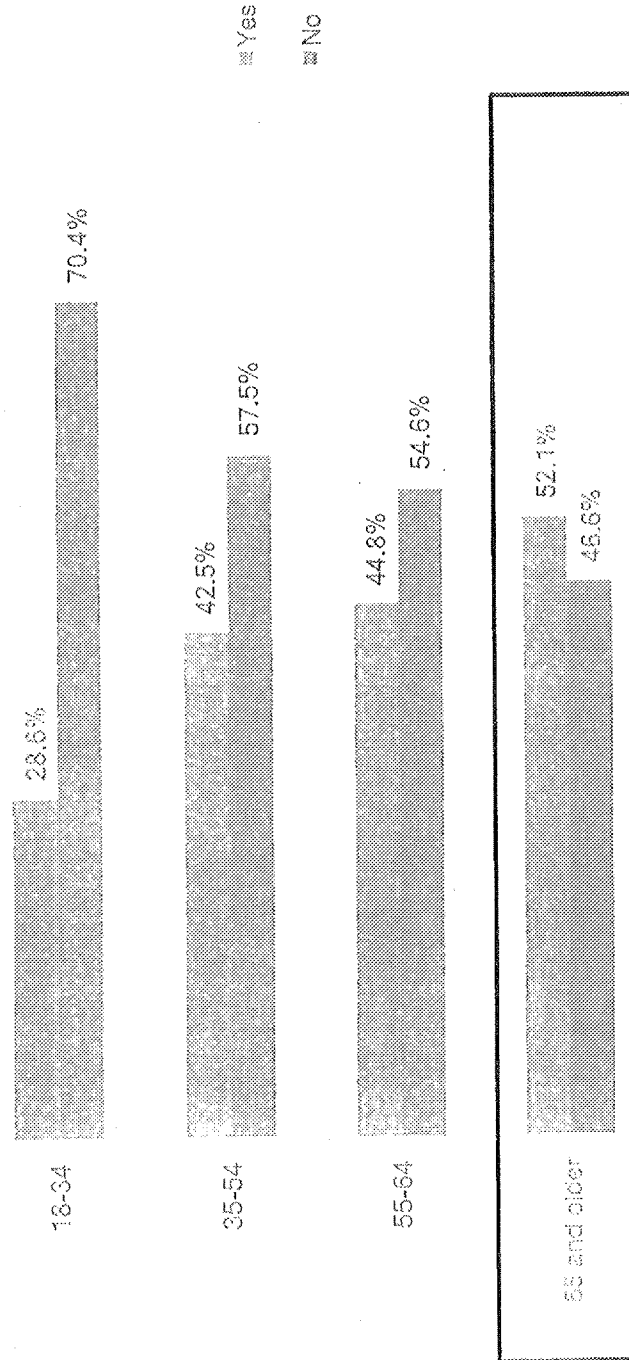


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Californians 65 and older are the only Age group (majority) that stays overnight when visiting the CA coast

Question: Do you ever stay overnight when you visit the California coast?



*ASKED OF ALL EXCEPT THOSE WHO RESPONDED "NEVER BEEN"



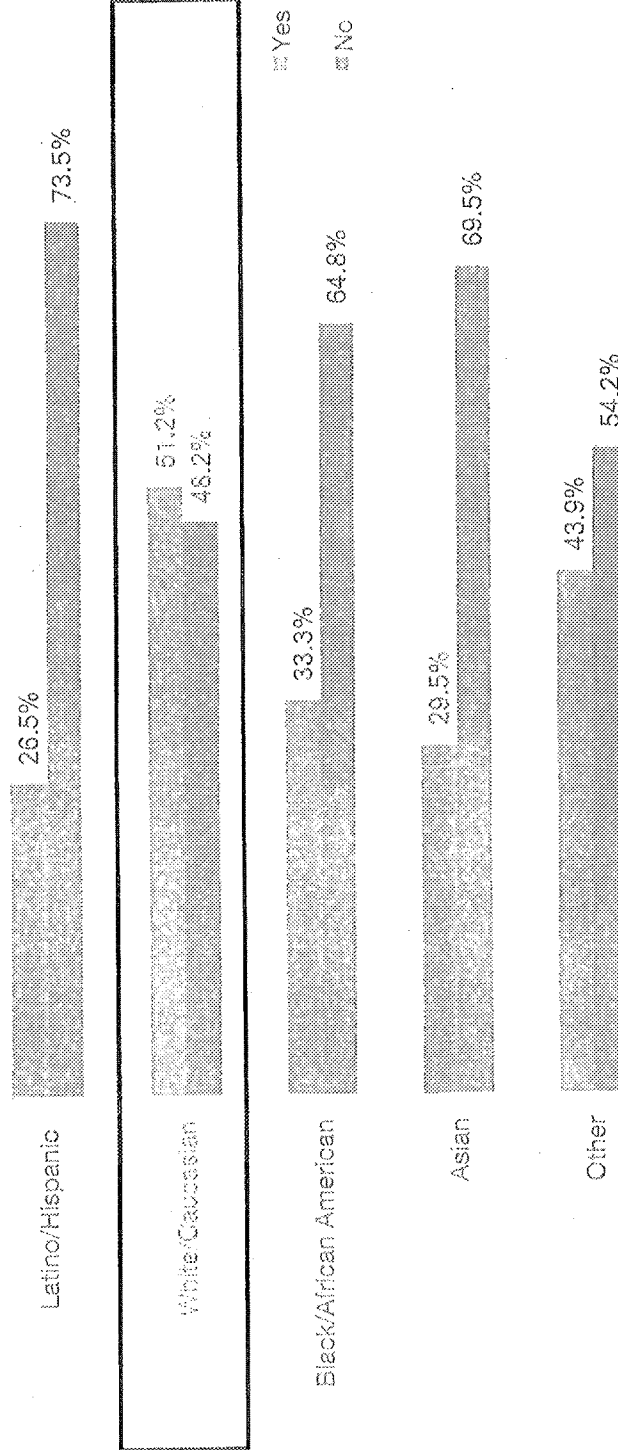
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A Majority of White/Caucasian Residents

Say they stay overnight when they visit the California coast

Question: Do you ever stay overnight when you visit the California coast?



*ASKED OF ALL EXCEPT THOSE WHO RESPONDED "NEVER BEEN"

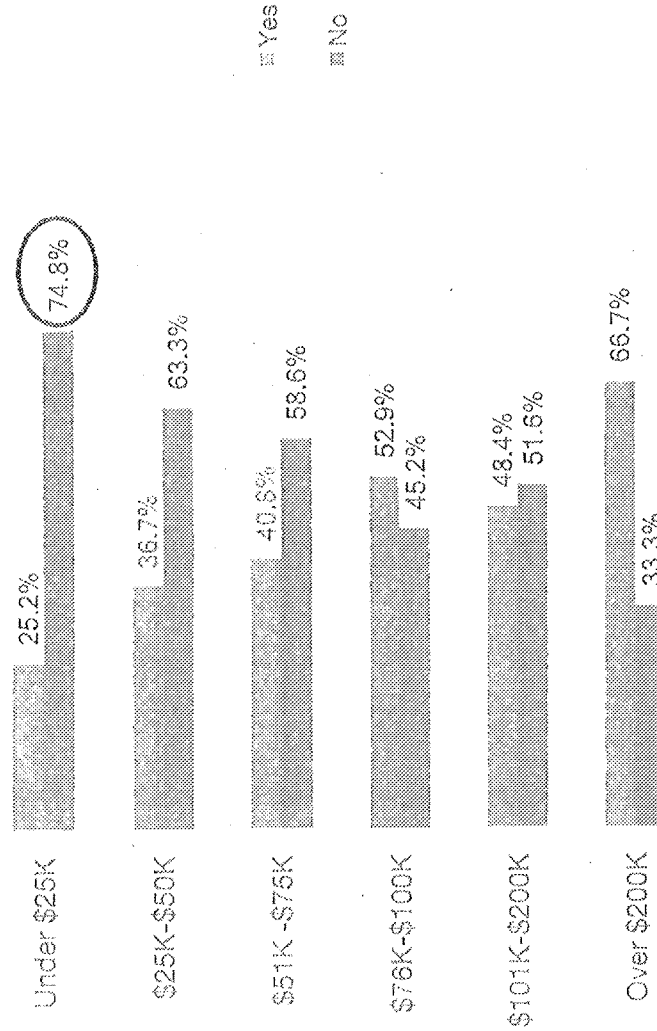


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74.8% of Those with a Household Income Under \$25K do not stay overnight at the CA coast

Question: Do you ever stay overnight when you visit the California coast?



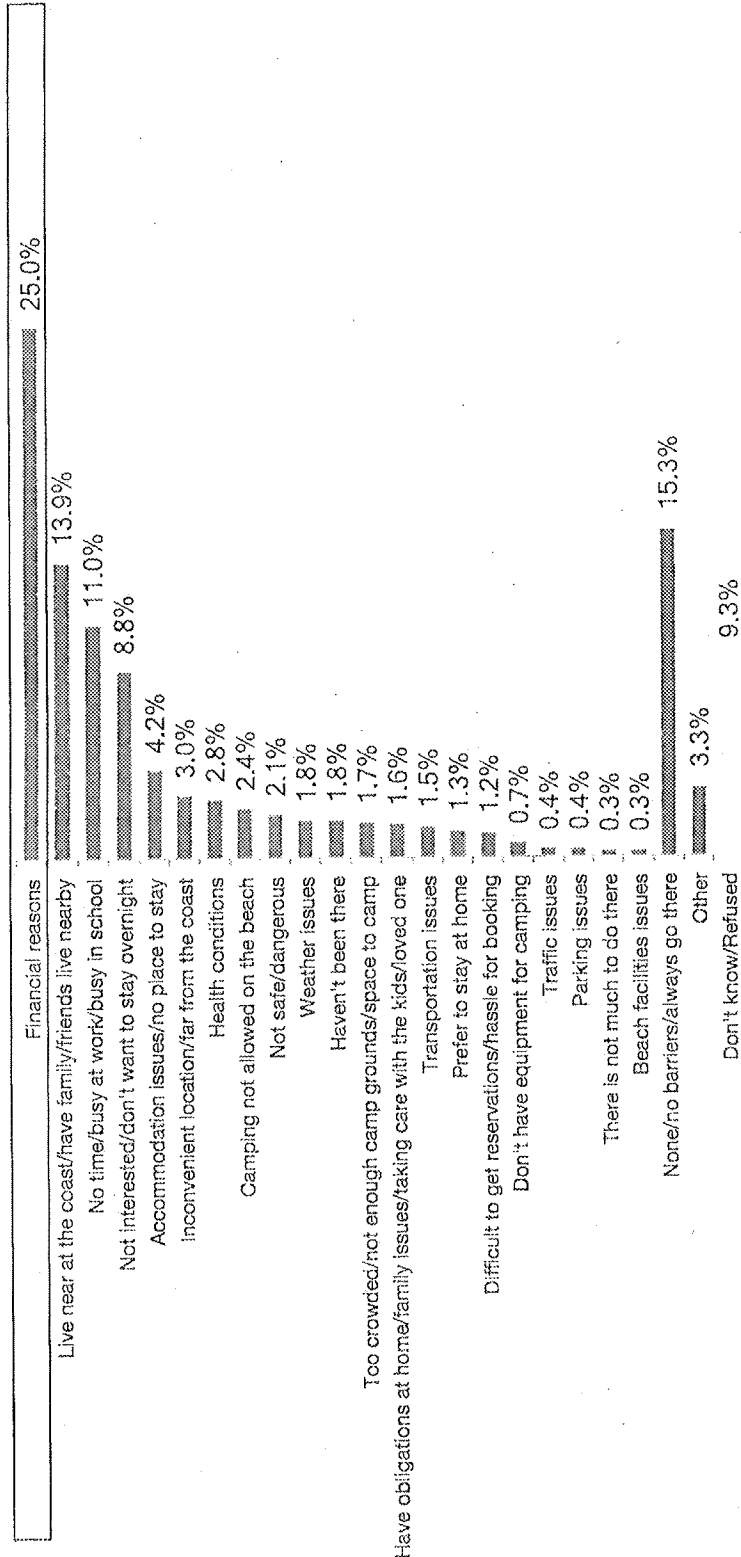
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25% of Respondents Note Financial

Reasons as a barrier to staying overnight at the CA coast

Question: In your own words, please tell me what are the barriers to staying overnight at the California coast.



ASKED OF ALL EXCEPT THOSE WHO RESPONDED "NEVER BEEN"



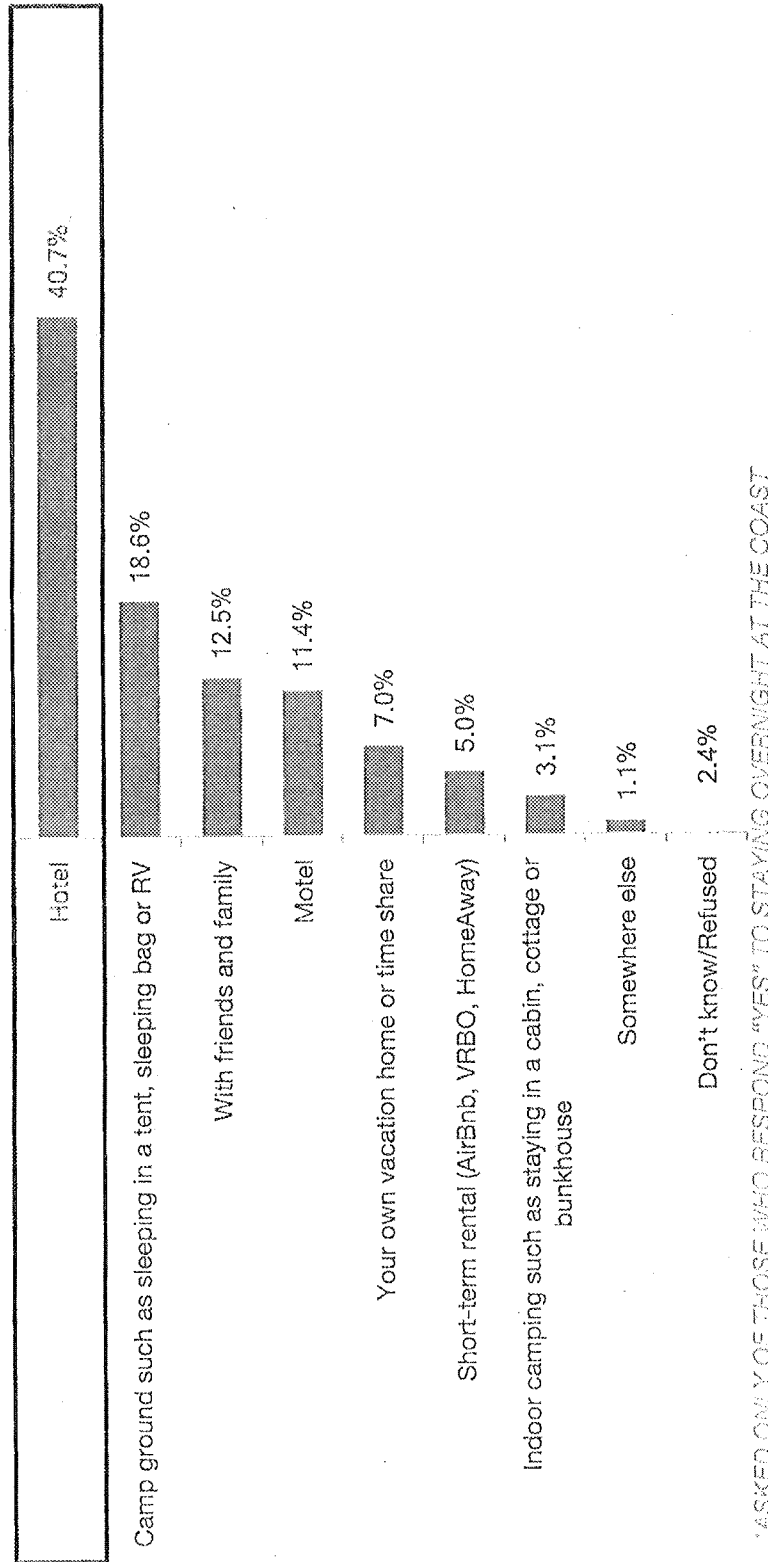
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Hotel Accommodations are Most Common

Among respondents when they visit the California coast

Question: What kind of accommodations do you stay at when you visit the California coast?

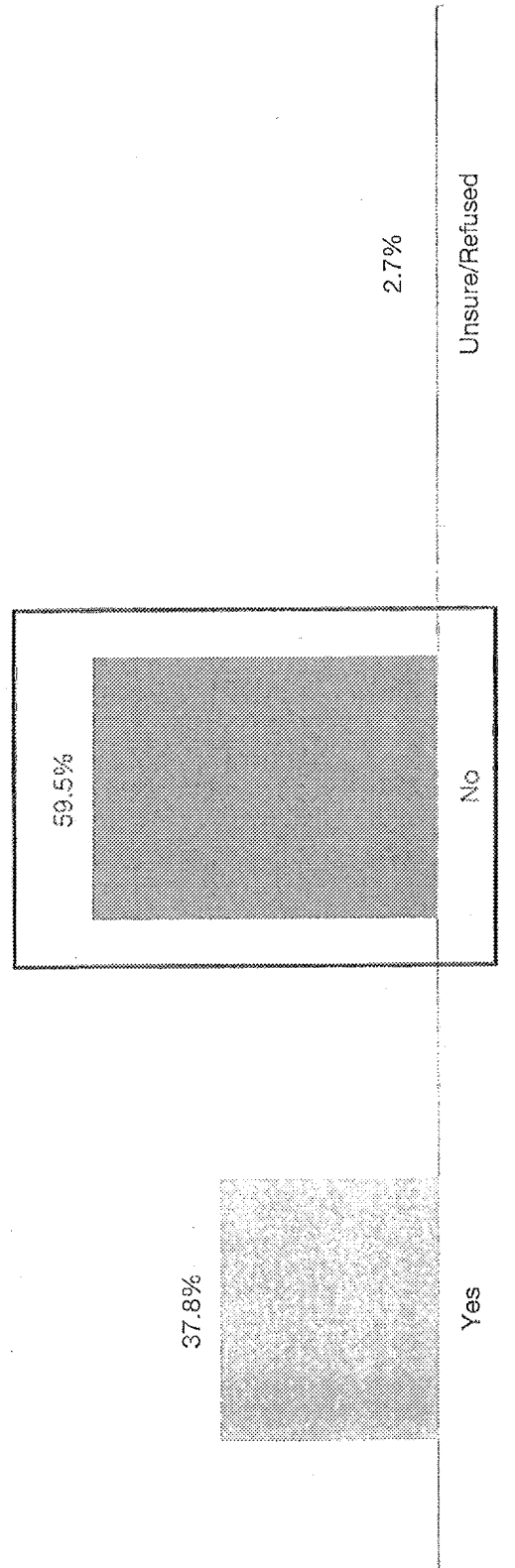


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59.5% of Respondents Would Not Stay in College dorms, or other similar accommodations, near the coast

Question: If there was an option to stay in college dorms near the coast, or other similar accommodations with shared bathrooms, for a modest per night price, would you ever choose to stay there?



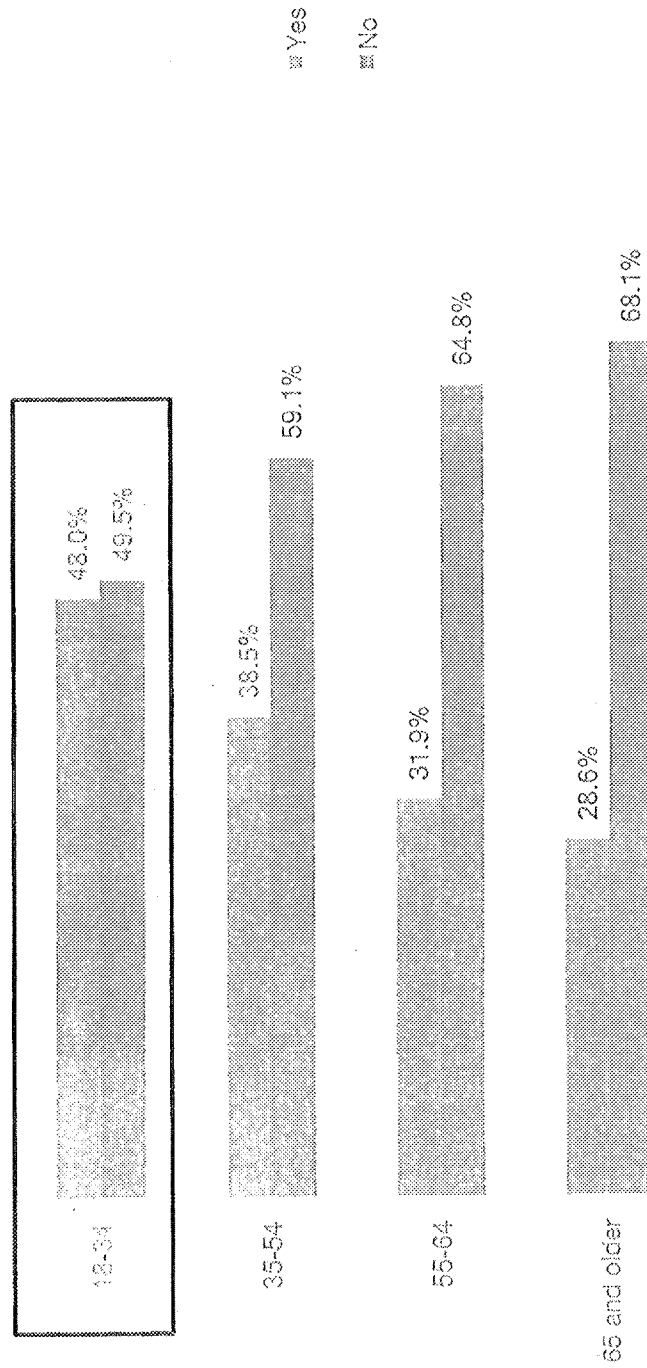
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Respondents 18-34 Show More Inclination

In choosing to stay in college dorms near the coast, or other similar options

Question: If there was an option to stay in college dorms near the coast, or other similar accommodations with shared bathrooms, for a modest per night price, would you ever choose to stay there?

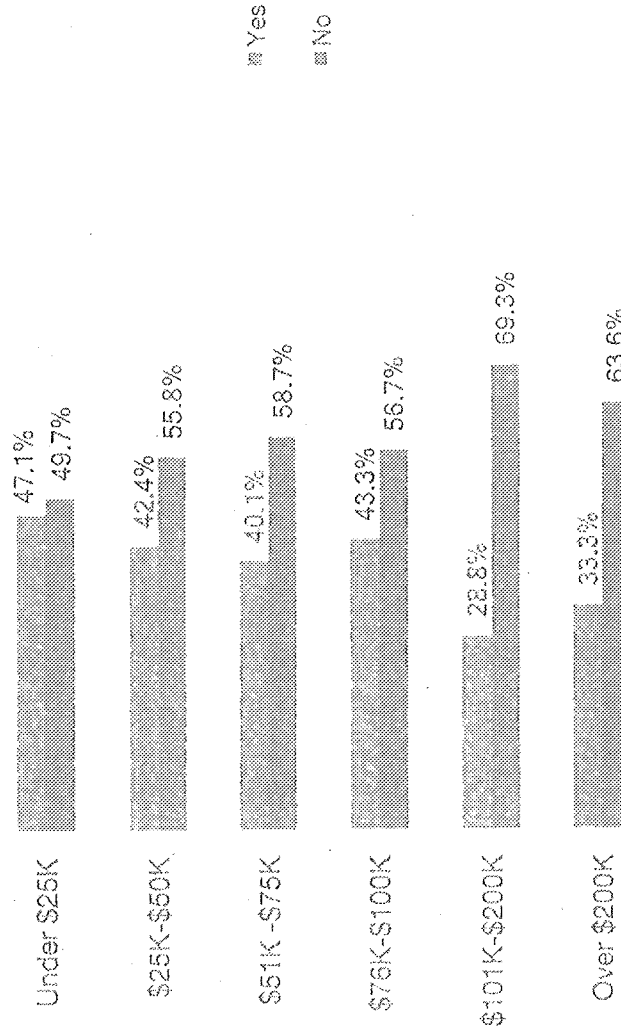


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A Majority of Respondents Across All Income Brackets would not choose to stay in college dorms/similar accommodations near the coast

Question: If there was an option to stay in college dorms near the coast, or other similar accommodations with shared bathrooms, for a modest per night price, would you ever choose to stay there?



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Overnight Accommodations



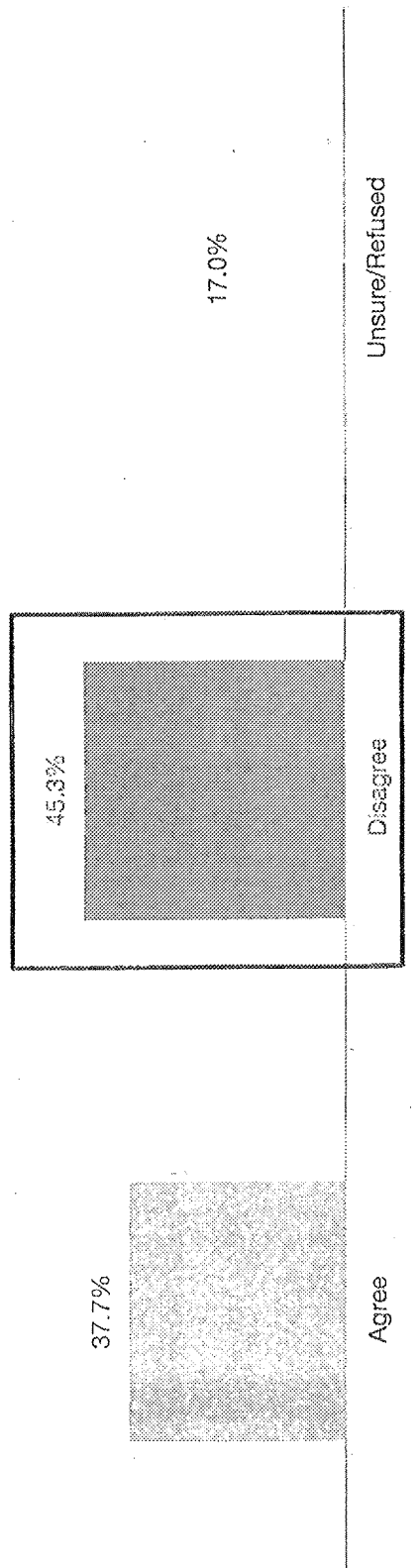
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45.3% of Respondents Disagree that Finding overnight accommodations at the CA coast is convenient and affordable

Statement: Finding overnight accommodations at the California coast is convenient and affordable.



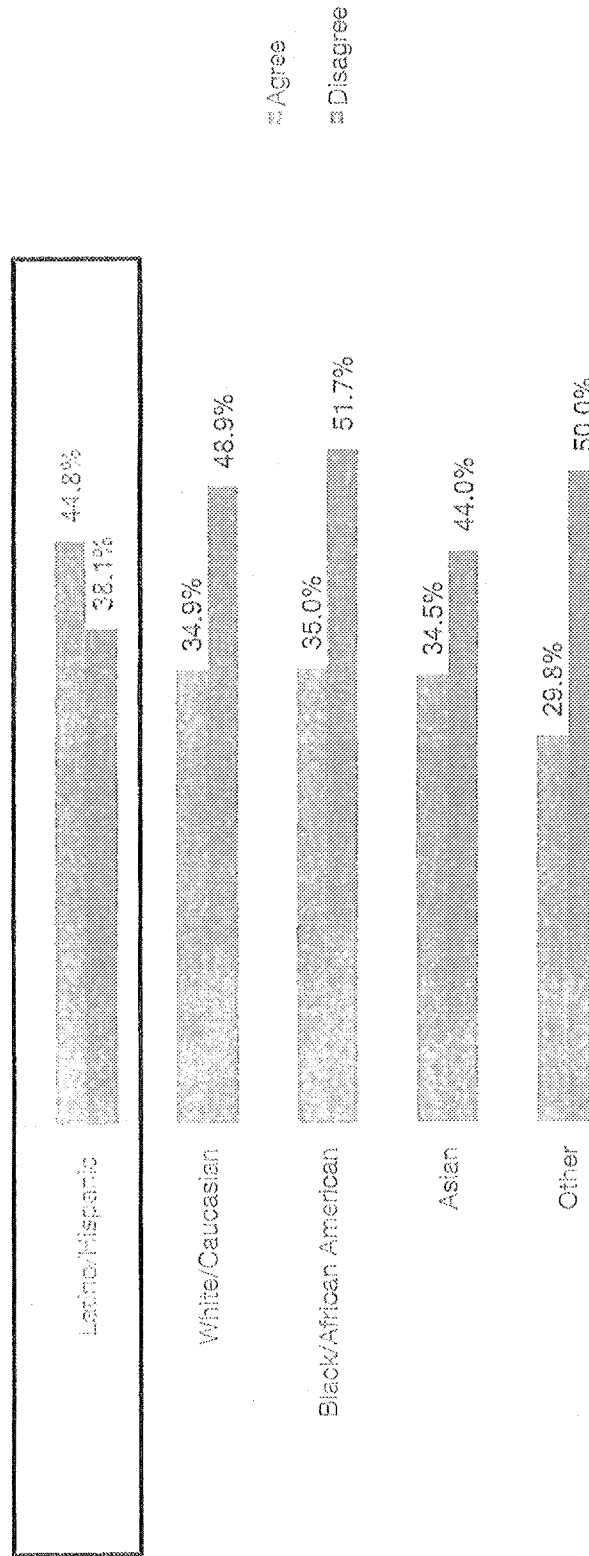
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Latino/Hispanic Residents Agree the

Most that finding overnight accommodations at the CA coast is convenient, affordable

Statement: Finding overnight accommodations at the California coast is convenient and affordable.

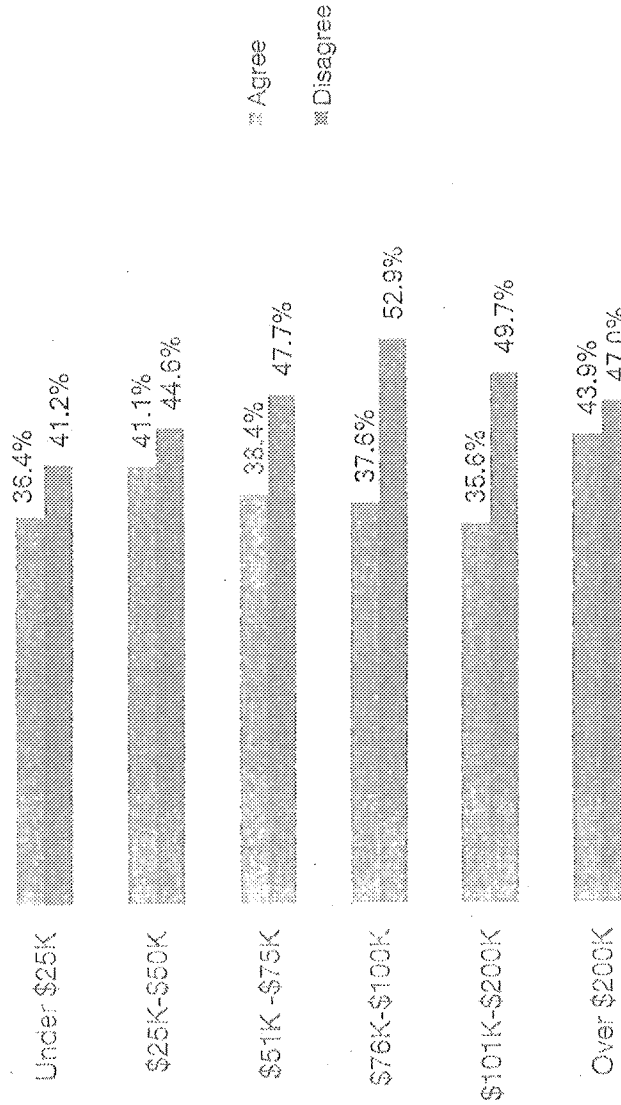


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A Majority of Respondents Across All Income Brackets disagree that finding overnight accommodations at the CA coast is convenient and affordable

Statement: Finding overnight accommodations at the California coast is convenient and affordable.



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Desire to Visit the Coast More Often

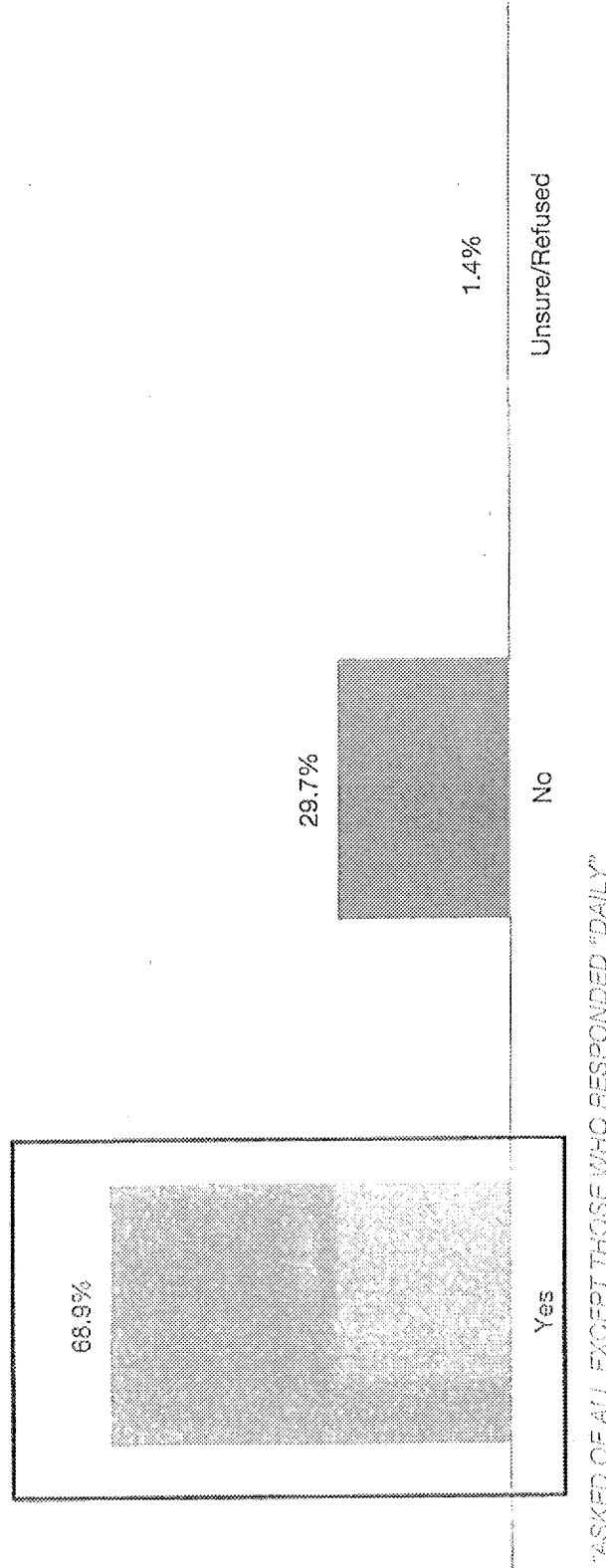


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68.9% Say They Wish They Could Visit the California coast more often

Question: Do you wish you could visit the coast in California more often?



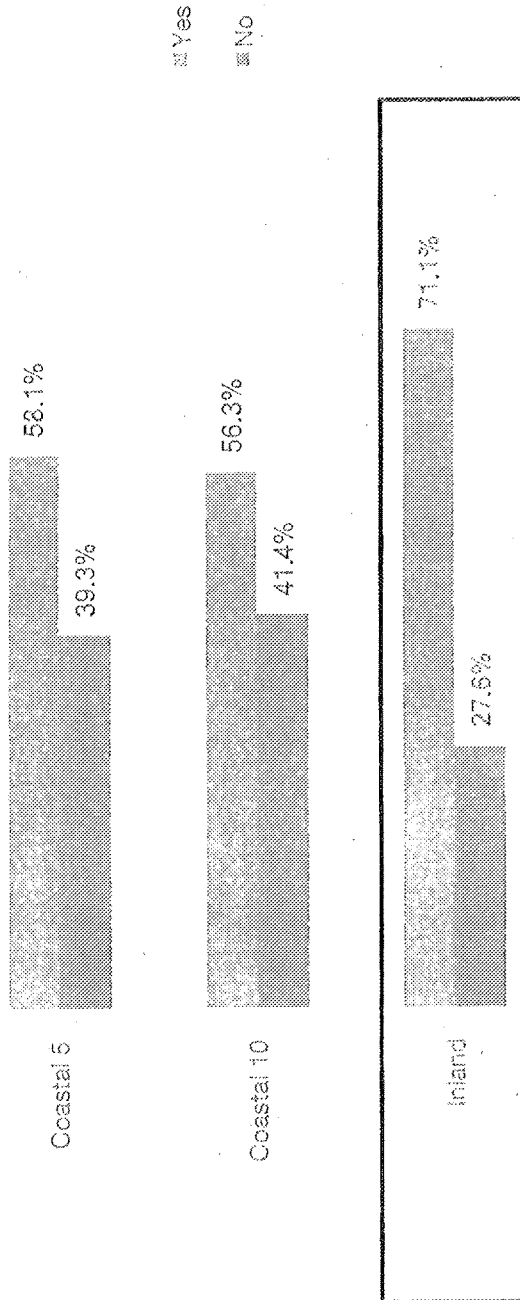
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71.1% of Respondents from Inland Area

Wish they could visit the coast in California more often

Question: Do you wish you could visit the coast in California more often?



*ASKED OF ALL EXCEPT THOSE WHO RESPONDED "DAILY"

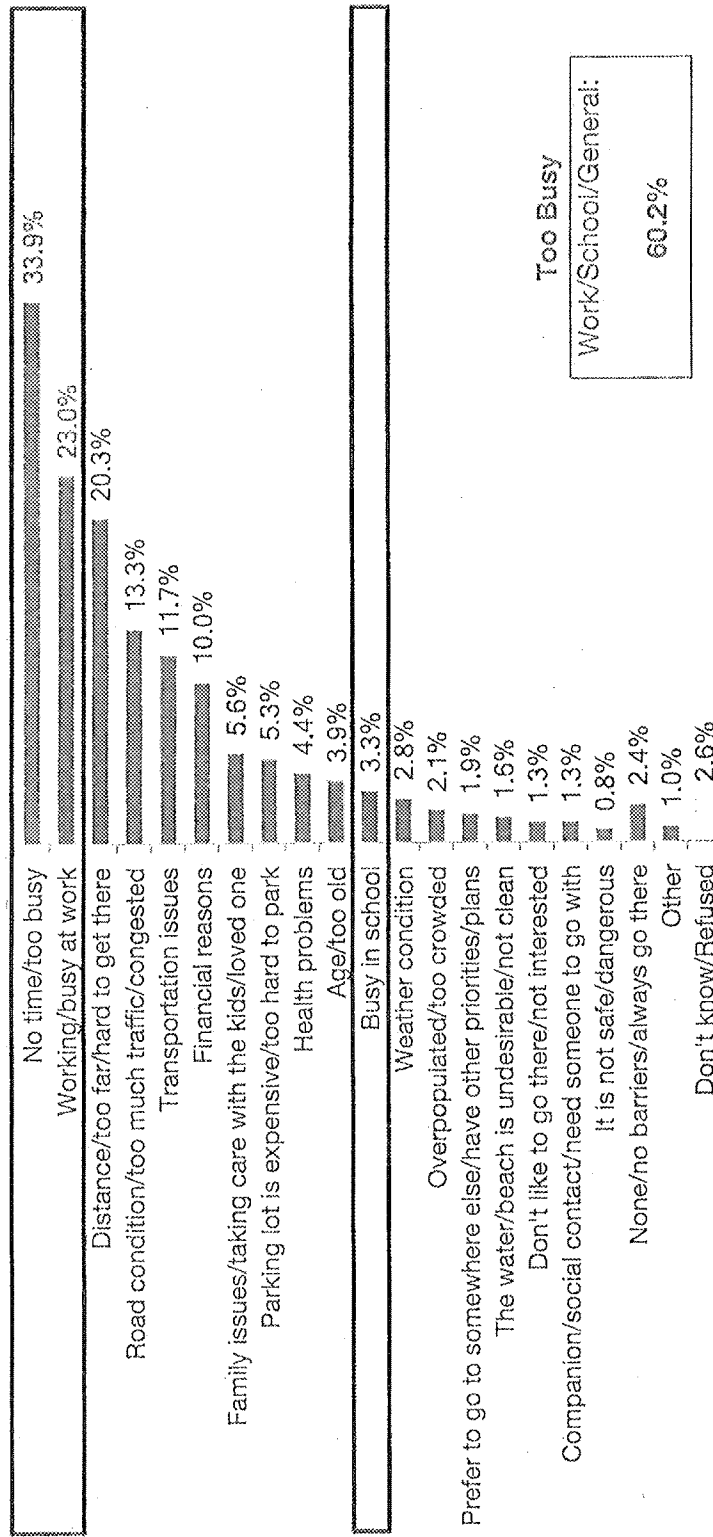


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60.2% Say They Have No Time or are Too busy with work or school to visit the coast more often

Question: In your own words, please tell me what are the barriers to your visiting the coast more often.



ASKED ONLY OF THOSE WHO WISH THEY COULD VISIT THE COAST MORE OFTEN



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Next Steps



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Next Steps

For the Coastal Conservancy

- CHALLENGE: Concern over transportation and distance cause more people not to visit the coast than any other reason.
- SOLUTION: Address this with new transportation options, such as partnerships with transit agencies or private enterprise.
- CHALLENGE: Cost is the top reason that prevents people from staying overnight at the coast.
- Find ways of offering low-cost options for overnight stays, such as the partnering with state universities. Increase/preserve the overall availability of overnight accommodations to drive down/stabilize costs.
- IMPORTANT: Californians have a strong connection to the coast; they appreciate it and want to visit it more. The coast has a different meanings to different people, including some who have fond memories of visiting as a child and others who simply like that the coast is there. Some people want a more active experience when visiting the coast, but most people like it the way it is now. It is important to recognize that even if people are not visiting the coast, they still highly value it.
- Measuring "coastal engagement" is not just about how many people physically visit the coast.



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Thank You.



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